

## Pre-Assessment

As of right now...

1. Do you have written goals? \_\_\_\_\_
2. Do you know your credit score? \_\_\_\_\_
3. Do you feel you are raising financially savvy children? \_\_\_\_\_  
(If you have no children, will you be able to raise them financially savvy if and when that day comes?)
4. Do you have a bank account? \_\_\_\_\_
5. Do you have a retirement plan? \_\_\_\_\_
6. Do you have a current, typed résumé and cover letter? \_\_\_\_\_
7. Do you have disability insurance? \_\_\_\_\_
8. Do you have health insurance? \_\_\_\_\_
9. Do you currently have a tax advisor? \_\_\_\_\_
10. Do you know how the stock market works? \_\_\_\_\_

For every yes, give yourself 1 point.

Total \_\_\_\_\_

0-3 Yes – You really need to start thinking about your financial future.

4-6 Yes – You’re getting there. Keep trying to make it better.

7-9 Yes – You’re on the right track toward a happy retirement. Don’t stop what you’re doing!

10 Yes – Why did you bother to enroll in this course? (Just kidding!)