



## Financial Wellness Assessment Questionnaire- Building The Whole You

Performing a financial assessment is a crucial first step toward gaining control over your finances and making informed decisions about your money.

- **Name:** \_\_\_\_\_ **Mobile Number:** (\_\_\_\_) \_\_\_\_\_
- **Email Address:** \_\_\_\_\_

We respect your privacy and do not sell or share your contact information. We will use it solely to keep you informed and provide valuable updates from Building The Whole You.

### Step 1: Define Your Financial Goals

**Short-Term Goals (1-2 years):** What are your short-term financial goals?

- Building an emergency fund  Paying off credit card debt  Other: \_\_\_\_\_

**Medium-Term Goals (3-5 years):** What are your medium-term financial goals?

- Saving for a down payment on a house  Planning a vacation  Other: \_\_\_\_\_

**Long-Term Goals (10+ years):** What are your long-term financial goals?

- Retirement planning  Funding your children's education  Other: \_\_\_\_\_

### Step 2: Evaluate Your Current Financial Situation

**Income:** What is your monthly after-tax income?

- Less than \$2,000  \$2,000 - \$4,000  \$4,000 - \$6,000  More than \$6,000

**Sources of Income:** What are your sources of income? (Check all that apply)

- Paycheck  Bonuses  Other: \_\_\_\_\_

**Expenses:** What are your monthly expenses? (Estimate the total amount)

- Less than \$1,000  \$1,000 - \$2,000  \$2,000 - \$3,000  More than \$3,000

**Debt:** What is your total outstanding debt?

- Less than \$5,000  \$5,000 - \$10,000  \$10,000 - \$20,000  More than \$20,000

### Step 3: Create a Strategic Financial Plan (Budget)

Do you currently have a monthly budget?

- Yes  No

### Step 4: Build an Emergency Fund

How much do you have saved in your emergency fund?

- Less than \$500  \$500 - \$1,000  \$1,000 - \$2,000  More than \$2,000

### Step 5: Tackle Debt Strategically (Debt Snowball)

Do you have a debt repayment plan?

- Yes, I'm following a plan  No, I need help creating one

### Step 6: Seek Advice

Would you be interested in a consultation with Building The Whole You to assist in your financial journey?

- Yes  No

**Biggest Financial Challenge:** What is your biggest financial challenge?

---

**Assistance Needed:** How can Building The Whole You assist you in your journey?

---