

# Financial satisfaction survey

Satisfaction can be defined as a feeling of fulfilment and contentment and is often dependent on one's definition of success. Therefore, evaluating your level of satisfaction with your financial life is much more of an emotional issue than a material one. Your sense of satisfaction is influenced heavily by your personal attitudes and beliefs.

The degree to which you feel satisfied with your financial situation is based on a unique set of interpretations related to your personal financial needs and circumstances. By completing the survey below, we will be able to assess your current level of financial satisfaction and gain an understanding of the circumstances and behaviours that may be impeding your ability to achieve a high level of satisfaction.

## Satisfaction scale

Please place a numerical value next to each aspect of your financial history, indicating your level of satisfaction.

Dissatisfied

Highly satisfied

1	2	3	4	5
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### Cash-flow management

- \_\_\_\_\_ The income my current job or career provides me
- \_\_\_\_\_ My ability to meet my financial obligations
- \_\_\_\_\_ My spending habits
- \_\_\_\_\_ The spending habits of my family members
- \_\_\_\_\_ My current amount of and ability to manage debt
- \_\_\_\_\_ The existence of and amount of my emergency fund

### Risk management

- \_\_\_\_\_ My ability to protect my current cash flow
- \_\_\_\_\_ My amount of life insurance coverage
- \_\_\_\_\_ My level of property and casualty insurance
- \_\_\_\_\_ My medical and disability insurance coverage

### Asset management

- \_\_\_\_\_ The amount of money that I save and invest on a regular basis
- \_\_\_\_\_ My ability to meet my short-term financial goals (vacation, car, etc.)
- \_\_\_\_\_ My ability to meet my long-term financial goals (education, retirement, etc.)

### Estate/Tax planning

- \_\_\_\_\_ My current financial plan
- \_\_\_\_\_ My plan for protection/transfer of my assets
- \_\_\_\_\_ My income/estate tax reduction strategy
- \_\_\_\_\_ My level of charitable giving

### Qualitative issues

- \_\_\_\_\_ My response to difficult financial circumstances
- \_\_\_\_\_ My level of financial knowledge
- \_\_\_\_\_ The level of meaning my finances bring to my life



The following are some additional considerations to help you think about how you define wealth and happiness in your life.

1. I define success in my working life as:

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2. I define success in my family life as:

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3. I define success in my financial life as:

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4. I define balance in my life as:

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