

FINANCIAL FREEDOM™ SCORECARD

We do not have a clear vision for our future.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	We have a well-defined vision for our future.
We do not have clear life and financial goals.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	We have clear life and financial goals.
We do not have a step-by-step action plan to achieve our goals.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	We have a step-by-step action plan to achieve our goals.
Our investments are scattered, disorganized and poorly mixed.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	Our investment portfolio is organized and properly diversified.
We have not reviewed all of the tools which could help us achieve our vision.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	We have reviewed all the tools which could help us achieve our vision.
We do not have a plan to guard against losses from LTC, disability or premature death.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	We have a plan to guard against losses from LTC, disability or premature death.
We do not have a transition plan in place for our estate.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	We have a well-defined plan in place for our estate.
We do not review our vision, plan or progress on a regular basis.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	We review our vision, plan and progress on a regular basis.
Our financial advisors work in isolation from each other.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	Our financial advisors work as a team to help us achieve our vision.
We do not have as much confidence in the future as we would like.	1 ○	2 ○	3 ○	4 ○	5 ○	6 ○	7 ○	8 ○	9 ○	10 ○	We have a strong sense of confidence about our future.

ADD COLUMN TOTALS

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YOUR SCORE
