

Financial Needs Assessment



**PROSPERING
FAMILIES**
P R E P A R E D N E S S F O R L I F E

Family Name: _____

Family Size: Adults: _____ Children: _____ Pets: _____

Family Goal: _____

Date: _____

Directions: Read each of the questions below and answer where your family stands on a scale of 1-10, ten being the best.

	1	2	3	4	5	6	7	8	9	10
1. We know our family's net worth:										
2. We pay more than the minimum balance due on our credit cards each month:	1	2	3	4	5	6	7	8	9	10
3. Our income is able to cover more than just our bills:	1	2	3	4	5	6	7	8	9	10
4. We realize that having checks in the checkbook doesn't mean there is money to spend:	1	2	3	4	5	6	7	8	9	10
5. We use the debit card rather than credit cards whenever we can:	1	2	3	4	5	6	7	8	9	10
6. We are placing at least 10% of our income each month into a long-term savings plan:	1	2	3	4	5	6	7	8	9	10
7. We have emergency savings for unexpected bills and emergencies:	1	2	3	4	5	6	7	8	9	10
8. We balance our checkbook(s) each month:	1	2	3	4	5	6	7	8	9	10
9. We have a strong desire to get out of debt as quickly as possible:	1	2	3	4	5	6	7	8	9	10
10. We know who to turn to if we feel our finances are out of control:										

PLEASE NOTE: This is general advice. You should ALWAYS consult with your own financial advisors before making any major financial decisions. Prospering Families is not responsible for any losses, damages or claims that may result from your financial decisions.