



Financial Fitness Self – Assessment

Date: _____ Name: _____ Current Member: YES or NO

Email: _____

My Financial Goals are :

My Financial Priorities and values include:

My biggest concerns:

How well does each statement apply to you?

Yes Somewhat Not applicable

I can pay my bill and loan payments on time every month.

My spending is controlled and reflects my goals and values.

I have an emergency fund that I contribute to on a regular basis.

I am saving for retirement on a regular and automated basis.

I have been saving up for my dream/goal.

I know my credit score and how to improve it or keep it strong.

My debt is manageable, intentional and connect to my goals.

I have adequate insurance for my life situation (life, health, etc.).

I understand my income taxes and I am up to date on all of them.

I understand and have access to sound and ethical financial services.

I will learn more about: _____

My action items: _____

Notes: _____

Please contact Heartland FCU at 937.294.1991 or info@thinkheartland.com to schedule an appointment with one of our Certified Financial Advisors. We can discuss this self-assessment and any financial concerns you have.