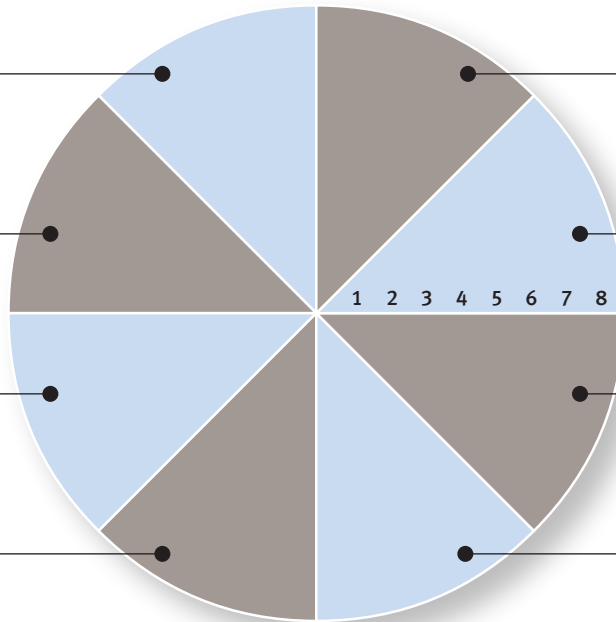


Tool: Wheel of life



Financial Wheel: Suggested follow-up questions

Which area(s) do you most want to improve?

What financial goal(s) could you set for that area/those areas? My goal is/goals are:

When do you intend to begin addressing that goal/those goals? (Answer for each goal.)

Clear the form

Save

Print

Tool: Wheel of life

Instructions:

Each pie slice below represents an area of your financial life. Mark your level of satisfaction for each by drawing on the dotted line associated with the number scale shown. The closer you are to a 10 on the outside of the circle, the more satisfied you are with that area of your life.

