

A {WILD} MONEY WORKSHEET

Self-Assessment



Read each question and circle Yes if the statement is true for you, or no if it's false.

If it's not a **STRONG** yes, it's a no.

DATE _____

1	I receive plenty of monthly income to live the life I desire.	Yes	No
2	I have a process for tracking or acknowledging the money I receive monthly.	Yes	No
3	I feel grateful and excited about the money I receive each month.	Yes	No
4	I understand the difference between my gross and net income.	Yes	No
5	I express gratitude for the money that flows into my life.	Yes	No
6	I have a clear idea of how much money I receive/earn each month.	Yes	No
7	I know my Squeak-By number; what I need for basic expenses and minimum debt payments.	Yes	No
8	I spend less than I make or receive each month.	Yes	No
9	My spending is conscious and intentional.	Yes	No
10	I know what my top five values are (what matters most to me), and my spending is in alignment with these values.	Yes	No
11	I understand myself well enough to know how to avoid impulse spending.	Yes	No
12	I pay attention to what I spend by tracking in a check register, or by looking online every few days.	Yes	No
13	I save at least 10% of my total income, monthly (savings/retirement/investments). If you are on a fixed income, count this question as "yes."	Yes	No
14	I know how much interest my savings are earning by percentage.	Yes	No
15	When I use my savings for an emergency or large purchase, I replenish it as soon as possible.	Yes	No
16	I understand my bank & brokerage statements and read them monthly.	Yes	No
17	I can explain the difference between savings, money market, and CDs.	Yes	No
18	I have at least \$20k in savings for emergencies.	Yes	No
19	I can accurately define these words: stock, bond, mutual fund.	Yes	No
20	I know the difference between dividends and interest.	Yes	No
21	I regularly invest my money (unless retired or on disability) and/or review what I am invested in.	Yes	No
22	I understand my own risk tolerance/comfort zone when it comes to investing.	Yes	No
23	I know myself well enough to either invest on my own or hire an advisor/planner.	Yes	No
24	I know how a Roth IRA works and why it's a great vehicle for retirement savings. If you are retired, count this question as "yes."	Yes	No
25	I have excellent health insurance for myself and my family.	Yes	No
26	If I have dependents (kids, parents, spouse) I have plenty of life insurance for income replacement and liquidity.	Yes	No



27	I have either a living trust, or a will, or power of attorney and advanced health care directive (Estate plan).	Yes	No
28	I have plenty of insurance on my home, car, personal property and I have an umbrella policy (additional liability coverage).	Yes	No
29	More than one other person knows where I keep my important documents, and if I have them in a safe, they know how to get in.	Yes	No
30	I have reviewed my beneficiaries on retirement, annuities, and life insurance in the past two years.	Yes	No
31	I have a regular practice of giving money or time to those in need.	Yes	No
32	The amount of money/time I give away is in balance with what I have to give.	Yes	No
33	I feel good about the way I practice generosity/philanthropy.	Yes	No
34	I understand what motivates me to donate to a particular cause.	Yes	No
35	I have a plan for how and to whom I give money.	Yes	No
36	I have my charitable intent written into my estate plan (will or trust).	Yes	No

For each section, give yourself one point for every yes.

Questions 1-6 **RECEIVE** _____

Questions 7-12 **SPEND** _____

Questions 13-18 **NURTURE** _____

Questions 19-24 **GROW** _____

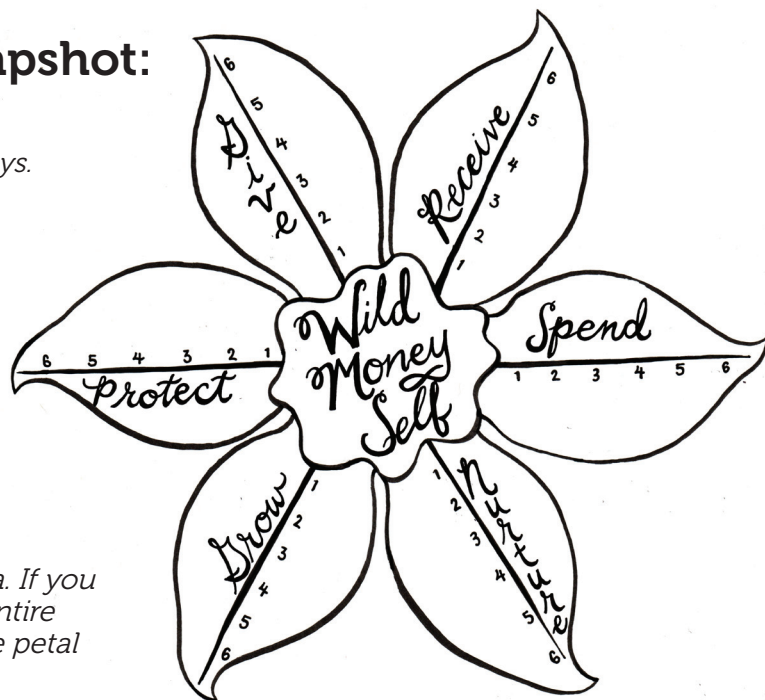
Questions 25-30 **PROTECT** _____

Questions 31-36 **GIVE** _____

MY TOTAL POINTS

Your Wild Money™ Journey Snapshot:

- 0-10 POINTS DOWNRIGHT DOMESTICATED:**
time to get to work and mend your ways.
- 10-20 POINTS WANDERING IN THE WOODS:**
you are headed in the right direction.
- 20-30 POINTS DANCING WITH YOUR WILD:**
you are doing great. Keep going.
- 30-36 POINTS WONDROUSLY WILD:**
call and teach me a thing or two!



Make it Visual... Color the petals of the mandala. If you have six points in the PROTECT section, color that entire petal blue. If you only have one point, fill in 1/6 of the petal with its corresponding color.