

The Financial Freedom Questionnaire

Part 1: The following are statements that might describe your relationship with money. Read each statement and then give yourself a score for each one according to this scale:

1 = No/Never 2 = Somewhat/Seldom 3 = Usually 4 = Yes/Always

	1 - 4 score
I live within my income.	
I am confident that I will have enough money for my future needs.	
I have adequate financial reserves in case of an emergency.	
I know how much I spend each month/year, and on what.	
I know what I enjoy and do well (my gifts and talents).	
I periodically go through my possessions and discard things I no longer need or use.	
I have trusted financial advisors with whom I am comfortable.	
I am clear about what I am (and what I am not) willing to do for money.	
I maintain a healthy balance between time spent earning money and other pursuits.	
I save and/or invest for the future.	
I have a financial plan that takes into account both my money goals and my life goals.	
I am doing work in alignment with my values that offers me the opportunity to express my talents.	
I am comfortable discussion money issues with the people closest to me.	
I have a clear vision about what I want to accomplish financially.	
I understand my investments, including the risks and potential returns.	
I am comfortable with my current level of debt.	
I know 'how much is enough' for me.	
When I spend money, it is for things that add value to my life.	
I have analyzed my future financial needs with the support of a professional advisor.	
I am comfortable with my relationship with money (not fearful, obsessed, or in denial).	
I plan and think about money when needed, but I do not dwell on it compulsively.	
I review and make adjustments to my investment portfolio regularly.	
I am comfortable with the level at which I support the organizations and people who are important to me.	
I have a clear picture of my future financial needs (funding for retirement, healthcare costs, long-term care, college tuition, etc.).	
I am clear on my values related to my money and my life.	

TOTAL SCORE _____

Part 2: Analysis

There is no correct or passing score. However, based upon the experience of many others who have taken the questionnaire the following feedback may be useful.

If your score is: 75 - 100

Obviously, your financial and life situation is in pretty good shape. Consider working through the Financial Freedom Process as a review, as an opportunity to make creative adjustments to your systems in response to the natural evolution that occurs as life unfolds. If your score is 100, you are either hopelessly in denial, or should be teaching this process in your community.

If your score is: 50 - 75

Some areas are in pretty good shape, others may need adjustment to support your needs. The Financial Freedom Process can illuminate where you need to plan more or add more awareness. It also empowers you to dig in and get more clear on your life plan and on how to create supportive financial resources.

If your score is: Less than 50

Most likely your current financial situation is not supporting your needs and intentions. There may be significant breakdowns in how you organize, view, and process your finances in relation to your basic needs as well as your larger intentions. You may not be aware of your overall purposes in life and how a financial system can support them. Really digging in and following each step of the Financial Freedom Process can guide you to a new and more skillful perspective on how to get where you want to be.

Part 3: Reflection

Notice your highest and lowest scores on the questionnaire.

What new insights have I gained?

What information do I need to move into the next phase of my financial health?
