

What is *YOUR*
*Fiscal*osophy™

*How you think about your
money is as important as
how you manage your money.*



Mark each statement below with the level of your agreement with the phrase:

I am comfortable using debt and credit.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

The stock market is the best place to make money.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

People should live on less than what they earn.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

I have consistently followed the above guideline in my life.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

I have been tempted at times to make wealth quickly.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

It is good to splurge at times to help you enjoy life.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

Becoming wealthy has a lot to do with luck and good fortune.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

Over time your home is your best investment.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

Insurance on your life, income, and investments is extremely important.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

Personalized and trustworthy financial advice is hard to find.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

There is too much confusion on how financial institutions are being paid.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree