

My Financial Thoughts **Where Your Money & Your Christian Values** **Meet**

Most people spend more time thinking about what they are going to watch on TV than they do about their financial plan. *My Financial Thoughts* will help you quickly, efficiently and very easily identify those aspects of your current financial plan that you are comfortable with, versus those which you feel may need improvement. Although completing this simple survey will take only approximately five minutes of your time, its effect could have substantial lifelong benefits.

Please circle your choice: Y=Yes N=No NS= Not Sure

My Investments

1. Y N NS I am very pleased with the performance of my investments.
2. Y N NS I am confident I am not taking too much risk.
3. Y N NS I am aware certain investments may be added to my portfolio that are non-correlated to the stock market.
4. Y N NS I am confident my investment portfolio is well diversified.
5. Y N NS I pay a fee to have my variable annuity and mutual fund portfolios managed, so that I do not have to make those decisions myself.
6. Y N NS My investment portfolio is well coordinated, so that I am taking advantage of all opportunities to save on taxes.

My Retirement

1. Y N NS I have a 401k, 403b, or other company-sponsored retirement plan.
2. Y N NS I maximize my contribution.
3. Y N NS I enjoy reading the prospectuses for the many different investment options.
4. Y N NS I am good at making the right investment allocations.
5. Y N NS If I could, I would hire a professional money manager to make the investment decisions for my account.

My Faith & Money

1. Y N NS My faith and values are important to me.
2. Y N NS I am aware many corporations make significant contributions toward advancing abortion rights.
3. Y N NS I am aware many corporations have adopted corporate policies and sponsorship programs to advance the political agenda of gay, lesbian, bi-sexual and transgender political groups.
4. Y N NS I am aware many mutual funds own stock in companies that receive substantial revenue from the pornography industry.
5. Y N NS It does not really matter to me what I invest in, so long as I achieve a good return.
6. Y N NS I have had my investments evaluated to make sure they reflect my values.
7. Y N NS If I trade stocks online, I integrate my values into my stock purchase decisions.
8. Y N NS I would like to have my stocks and/or mutual funds evaluated according to my values.

My Cash Flow

1. Y N NS The amount of money I make exceeds the amount of money I spend each month.
2. Y N NS I have taken advantage of all available tax reduction strategies.
3. Y N NS I use credit wisely.
4. Y N NS I am comfortable that my home equity is being appropriately and effectively utilized in my financial plan.
5. Y N NS I have a money market account and debit card that I use for travel, online purchases, and shopping.

My Insurance

1. Y N NS I have adequate health insurance.
2. Y N NS I am familiar with Long Term Care insurance and am comfortable with what I know.
3. Y N NS In the past two years, I have evaluated my life insurance needs.
4. Y N NS I am satisfied with the amount of life insurance I own.
5. Y N NS The type of life insurance I own is the least expensive and most effective type for my situation.
6. Y N NS My Disability Income insurance is appropriate for my situation.
7. Y N NS I am aware of the definition of “disability” in my policy.
8. Y N NS The amount of money my disability policy will pay me is right for my family’s financial needs.

My Financial Advisor

1. Y N NS My financial advisor communicates with me frequently.
2. Y N NS I am pleased with my current financial advisor.
3. Y N NS My financial advisor discusses strategies that are non-correlated to the stock market.
4. Y N NS My financial advisor is independent and adequately licensed to be able to meet my financial planning needs.
5. Y N NS I have learned a lot from my financial advisor and the books and information that he/she has introduced to me.
6. Y N NS My financial advisor has asked me if I want to reflect my values in the way I invest my money.
7. Y N NS My financial advisor has described to me how he/she makes sure my investments reflect my values.

My Contact Information

Name _____

Address _____

City, State, Zip _____

Daytime Phone _____

Evening Phone _____