



ADVISORY GROUP, LLC

Financial Condition Confidence Test

Name:
Phone:

E-mail:

Indicate the degree to which you agree (10) or disagree (1) with the statements below. Once you are finished, total your score.

1. I am confident that my current financial strategy will enable me to achieve what I want. ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

2. I am confident that I have a full understanding of all the issues that could impact my financial future. ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

3. I am comfortable with the overall performance of my investments. ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

4. My advisor provides consistent, proactive and effective communication. ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

5. My financial advisor's approach with me and my family enables us to remain confident regardless of what is happening "in the world." ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

6. I am comfortable with the plans we have in place to address all future cash flow events (i.e. costs for college, education, weddings). ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

7. I am confident that should anything unexpected happen to anyone in my family, it would not impact our financial situation. ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

8. The financial strategy my advisor has laid out for me provides a clear roadmap that guides my ongoing decisions. ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

9. My financial advisor coordinates the work of my various other advisors, providing me with a simpler and more streamlined process to manage my financial life. ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

10. My advisor has freed me from worrying about financial contingencies and enabled me and my family to focus more on enjoying our lives. ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

When considering my wealth, the area I am least comfortable with is: (use back if necessary) **Total Score**