

My Financial Personality

Your financial personality isn't about how much money you have. It is about your habits, goals and beliefs about finances. Please answer the following questions to help understand your financial personality. There are no wrong answers! If the question does not apply to you, simply write "N/A"

The questions are not in any specific order and generally fall into the categories below:

- Day to day spending
 - Financial Planning
 - Family and children
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1. When you wash the dishes do you turn the water on and off or leave the water running while rinsing the dishes?
2. What type of vacations have you taken in the past 10 years?
3. What type of travel do you hope to do in the next 5 years?
4. When do you plan to retire?
5. What will you fill your days with?
6. Are you a "Saver?"
7. Do you have a financial advisor or manage your own finances?
8. Do you invest your money?
9. Do you use an accountant?
10. Do you plan on having a pre-nuptial agreement if you get married?
11. Do you have wills and/or trusts set up?
12. Do you plan to leave money to your children?
13. Do you have 529's or pay ahead plans for your children's college plans?
14. What are your goals, dreams for retirement?
15. What are the last 3 restaurants you have gone to?
16. How do you generally celebrate your children's or family member's birthdays?

17. Do you prefer eating out or cooking at home or ordering in?
18. What is your most expensive hobby?
19. How often do you buy/lease new cars?
20. Do you own or rent your home?
21. Do you own more than one property?
22. In your job are you commission based, salary or both?
23. How often do you eat out?
24. When you receive a bonus what do you do with it?
25. If you won 5 million dollars in a lottery, what would you do with it?
26. What is your credit score?
27. Do you do a budget?
28. Are you paying student loans?
29. Have you inherited money, or do you anticipate inheriting money?
30. Would you consider yourself spontaneous or more analytical?
31. Do you plan to pay for your child's (children's) weddings?
32. Do you pension plans?
33. Do you lean toward "Save now, spend later!" or "Live life because No one knows what tomorrow brings!"
34. Do you pay child support or alimony?
35. Do you have health insurance through your employer or individually?
36. Do you donate money to charitable groups on a regular basis?
37. When shopping for a TV...are you looking for the best TV or the most reasonable?
38. Do you have life insurance?
39. You move into a new house without furniture...do you hire a decorator or DIY?
40. Do you feel like your financial personality has changed over the years?

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