## "Financial Target Wheel"



Client	Date	

## Are You On Target?

**Directions:** This exercise will help stimulate your thoughts toward assessing your overall financial situation, by helping you target your financial strengths and weaknesses.

Within each of the following ten areas, circle the number that best represents your level of satisfaction in that area of your household finances (7=Completely satisfied; 4=Content, 1=Completely dissatisfied).

## **Understanding of Your Financial Situation Estate Plan Investment Portfolio** Exit Strategy S 3 Tax Strategy **Debt** 2 Minimizing taxes on Current level of debt and 9 debt, savings and rates paid on mortgage, investments home equity, credit cards, O 0 **Plans & Goals** Savings Rate Clarity on future goals, S For children's including retirement education, retirement, etc. plan ω N **Current Income Level of Charitable** From all sources. **Donations** including household wages and investments. **Risk Exposure** Overall level of risk to your financial standing, including satisfaction with insurance coverage.

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