

"360° Financial Target Wheel"



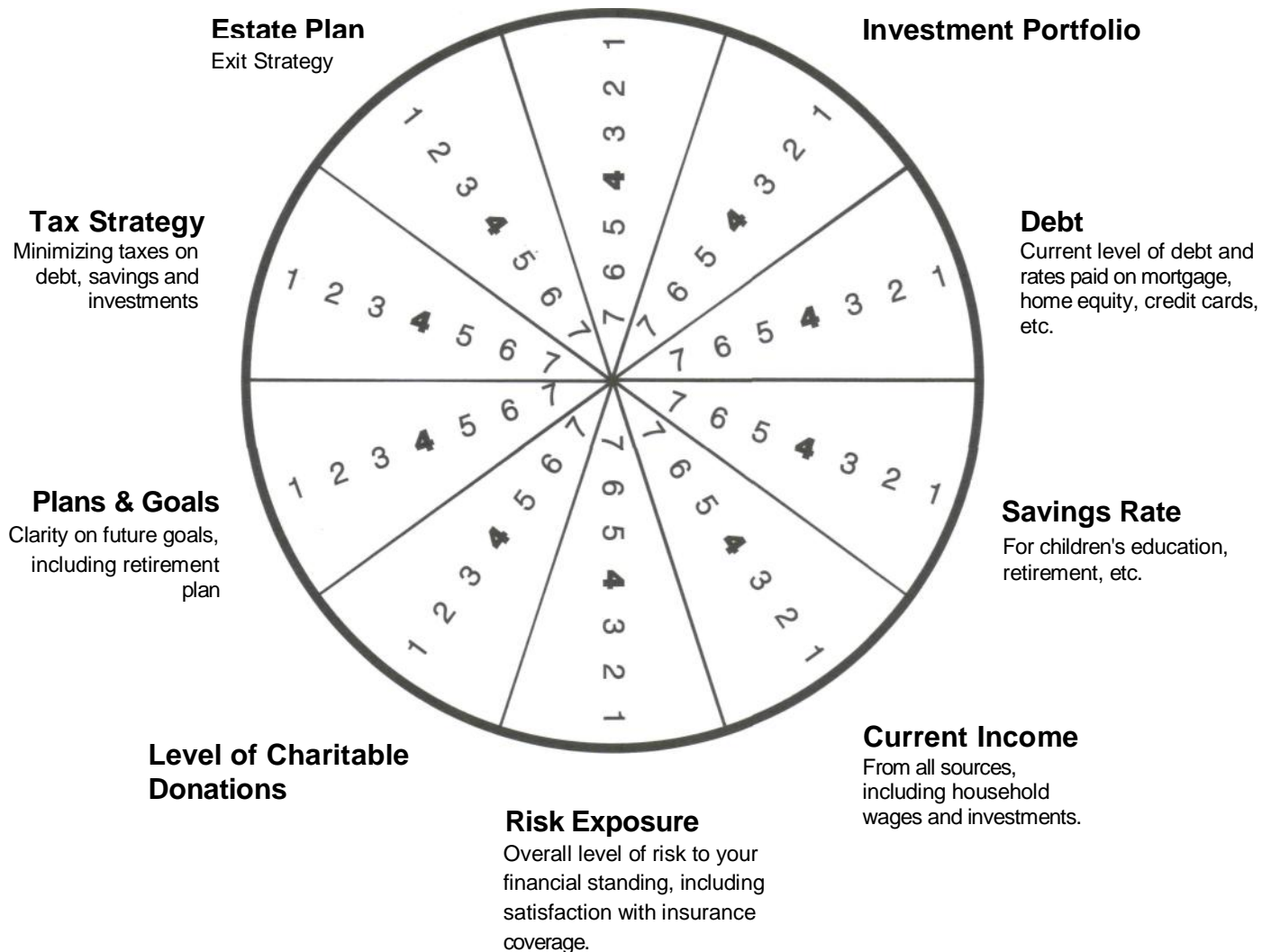
Client _____ Date _____

Are You On Target?

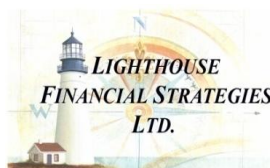
Directions: This exercise will help stimulate your thoughts toward assessing your overall financial situation, by helping you target your financial strengths and weaknesses.

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



This form collects data for informational purposes only and does not supersede any data or information reported on official Cambridge forms. This information is provided by you (the client). If any of the information is incorrect, you should notify your financial advisor. The information provided by you should be reviewed periodically and updated when either the information or your circumstances change.



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