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| ***Source: Britepaths******SAMPLE: FINANCIAL HABITS SURVEY******All information will remain confidential*** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. | Are you following a monthly budget? | Yes | No |  |
|  |  |  |  |  |
| 2. | At the end of the month, do you **usually:** | Have $ left over | Break even | Can’t meet expenses |
|  |  |  |  |  |
| 3. | Have you been able to save any money in the last three months? | Yes | No |  |
|  4. | Do you have debt? | Yes | No |  |
| 5. | Have you been able to decrease your debt in the last three months? | Yes | No | N/A\* |
|  |  |  |  |  |
| 6. | Do you have a savings account? | Yes | No |  |
| 7. | Do you have a checking account? | Yes | No |  |
| 8. | Do you keep track of your bank balances? | Yes | No | N/A\* |
|  |  |  |  |  |
| 9. | Have you paid **any** late penalties in the last three months? | Yes | No |  |
|  |  |  |  |  |
| 10. | Have you seen your credit report in the last three months? | Yes | No |  |
|  |  |  |  |  |

*\* N/A to mean “Not Applicable”*

*Note: Clients complete this survey prior to meeting with a financial planner and agree to complete a post survey interview 90 days after receiving this free education.*