

## FINANCIAL SATISFACTION SURVEY

Please complete this survey by selecting your most accurate response to each question. We will use this survey to focus on your most important concerns.

If you have a partner, each of you should complete the survey independently.

Thank you!

The Strebel Planning Group Team

### PERSONAL INFORMATION

First & Last Name: \_\_\_\_\_ Today's Date: \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ Zip: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Email \_\_\_\_\_

### I AM SATISFIED...

***\*Please rate your satisfaction on a scale of 1 to 5. 1 being dissatisfied, 5 being very satisfied.***

**1. ...with my ability to meet my financial obligations**

Your satisfaction rating \_\_\_\_\_

**2. ...with the income my current job or career provides me**

Your satisfaction rating \_\_\_\_\_

**3. ...with my spending habits**

Your satisfaction rating \_\_\_\_\_

**4. ...with the level of debt I carry**

Your satisfaction rating \_\_\_\_\_

**5. ...with the "extras" that I am able to buy for myself and/or loved ones**

Your satisfaction rating \_\_\_\_\_

**6. ...with the level and quality of insurance protection I currently have**

Your satisfaction rating \_\_\_\_\_

***\*Please rate your satisfaction on a scale of 1 to 5. 1 being dissatisfied, 5 being very satisfied.***

7. ...with the amount of money that I save and invest on a regular basis

Your satisfaction rating \_\_\_\_\_

8. ...with my current investment choices.

Your satisfaction rating \_\_\_\_\_

9. ...that I am on track to build a sufficient retirement nest egg.

Your satisfaction rating \_\_\_\_\_

10. ...with the level of employee benefits I receive.

Your satisfaction rating \_\_\_\_\_

11. ...with my ability to provide financial help to family members.

Your satisfaction rating \_\_\_\_\_

12. ...with my estate plan.

Your satisfaction rating \_\_\_\_\_

13. ...with my level of charitable giving.

Your satisfaction rating \_\_\_\_\_

14. ...with the level of financial education I have attained.

Your satisfaction rating \_\_\_\_\_

15. ...with how I respond emotionally to my personal finance issues.

Your satisfaction rating \_\_\_\_\_

16. ...with my ability to communicate about my financial matters.

Your satisfaction rating \_\_\_\_\_

17. ...with the feelings I have about my money life.

Your satisfaction rating \_\_\_\_\_

18. ...that financial issues do not cause stress or strain in the relationships that are important to me.

Your satisfaction rating \_\_\_\_\_

19. ...with the working relationships I have with my financial service providers (i.e., insurance agent, banker, broker, financial planner, accountant).

Your satisfaction rating \_\_\_\_\_

CONTINUED...

*\*Please rate your satisfaction on a scale of 1 to 5.*

*1 being dissatisfied, 5 being very satisfied.*