



TAKE A FINANCIAL SELFIE

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Remember the old tests in gossip magazines when you were young? Well, here's one to help you clearly understand your current situation, try *The Lifestyle PILOT Scorecard*[™]. Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 10. Add up your total from each column.

We do not have a clear vision for our future	1	2	3	4	5	6	7	8	9	10	We have a clear, well-defined vision for our future
We do not have clear financial goals	1	2	3	4	5	6	7	8	9	10	We have clear financial goals
We do not have a strategy to achieve our desired lifestyle	1	2	3	4	5	6	7	8	9	10	We have a strategy to achieve our desired lifestyle
We do not have a step-by-step action plan to achieve our goals, both personal and financial	1	2	3	4	5	6	7	8	9	10	We have a step-by-step action plan to achieve our goals, both personal and financial
Our financial affairs are scattered and disorganized	1	2	3	4	5	6	7	8	9	10	Our financial affairs are integrated and organized
We have not explored all of the resources which could help us achieve our desired lifestyle	1	2	3	4	5	6	7	8	9	10	We have explored all of the resources which could help us achieve our desired lifestyle
We are trying to do everything ourselves	1	2	3	4	5	6	7	8	9	10	We have delegated all of the activities that we don't want to do
Our financial advisors work in isolation from each other	1	2	3	4	5	6	7	8	9	10	Our financial advisors work as a team to help us achieve our desired lifestyle
We do not have a structured plan to use for our wealth charitable causes	1	2	3	4	5	6	7	8	9	10	We have a structured plan to use for our wealth charitable causes
We are not fully confident that we will achieve our desired lifestyle	1	2	3	4	5	6	7	8	9	10	We are fully confident that we will achieve our desired lifestyle
ADD COLUMN TOTALS											YOUR SCORE _____

For each row, ask:

- Why did you give yourself that score?
- What do you think you need to do to improve your score?

To book a meeting to review your *The Lifestyle PILOT Scorecard*[™] scorecard results, contact us at **905-277-xxxx** or **rgaloria@assante.com**.



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