CHURCH PENSION GROUP

Financial Assessment

Please complete this form for yourself. If you are part of a couple, your spouse/partner should complete their own form.

Yes	No	Your Financial Picture
☐	☐	I developed and use a spending plan to help manage my finances.
☐	☐	I have a national credit card in my own name.
☐	☐	I typically pay my credit card balance in full each month.
☐	☐	I review my credit reports on a yearly basis.
☐	☐	I have established a "rainy day" fund for emergencies.
		Your Roadmap to Investing
☐	☐	I have developed financial goals and the time frame to reach them.
☐	☐	I am saving money on a regular basis toward specific financial goals.
☐	☐	I have developed and am comfortable with my investing strategies.
☐	☐	I review my retirement investments at least yearly.
		Securing Your Retirement
☐	☐	I know my employer retirement benefits.
☐	☐	I know approximately what my Social Security income will be in retirement.
☐	☐	I know approximately what my future income from my investments will be in retirement.
		Protecting You and Your Family
☐	☐	I have an up-to-date will.
☐	☐	I have authorized another person(s) to act on my behalf under a "power of attorney" for financial and health decisions.
☐	☐	When I die, my survivors know whom to notify.
☐	☐	I have documents pertaining to my personal and family finances where my family can find them. (wills, insurance policies, property deeds, etc.)
☐	☐	I have discussed my final wishes with appropriate family members
☐	☐	I have reviewed my insurance coverage (life, disability, long term care, auto, home, liability) and have or will make changes to fill in any gaps.