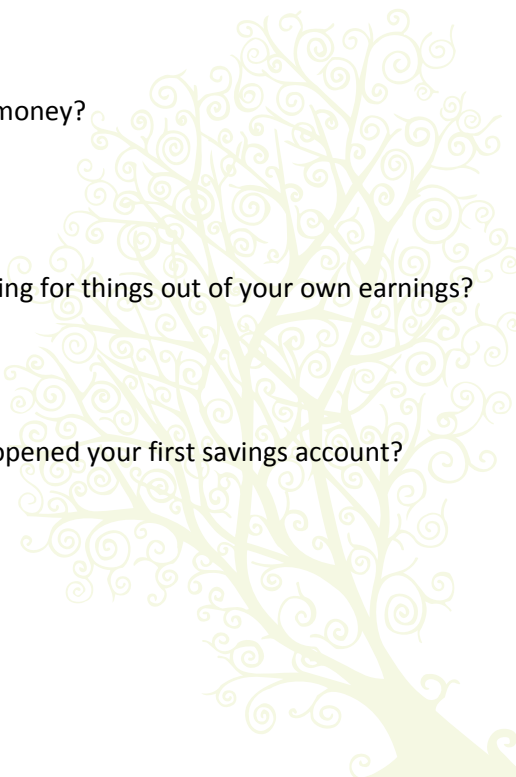




MONEY PERSONALITY QUESTIONNAIRE

Name: _____ Date: _____

1. What messages did you receive about money as a child growing up? What are your earliest money memories?
2. Did you feel you had everything you needed and wanted as a child living at home or did you feel deprived?
3. Did your closest friends have more or less than you did?
4. How did you parents handle money?
5. At what age did you start paying for things out of your own earnings?
6. Do you remember when you opened your first savings account?



7. What age did you take your first job and how much did you make?

8. At what age did you become completely independent in regards to money?

9. Do you feel you got an adequate financial education growing up?

10. How do you feel you manage your money now?

11. Do you have a budget?

12. Do you know where your money goes?

13. Do you feel you have all you need and want now, or do you feel deprived?

14. Do you feel secure about your financial future?

15. How do you feel about the ups and downs of the stock market?

16. How would you describe your investment philosophy?

17. Do you have charitable inclinations? If so , what is your favorite charitable cause?

18. Do you find it easy to receive money that you haven't earned, such as an inheritance?

19. Do you ever feel guilty about what you spend your money on or how much money you spend?

20. If you had more money to spend , what would you spend it on?

21. Are you happy with the amount of money you have available to spend now? If not, how much more do you need?

22. Do you ever feel afraid that you won't have enough?

23. Do you have any money secrets? If so , would you like to share them?

24. Where do you see the state of your finances in five years, what would you like your net worth to be? How about in 10 years?

25. What would being financially successful feel like to you?