



**Take this quick
financial fitness
check-up
and see where you
stand with your
finances.**

Tarlie Francis

GREAT Pathways

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To find out just what kind of financial shape you're in, answer the questions in the following Financial Fitness Checklist. If you're married, print this out and take it home so that you and your spouse can work together to answer the questions.

Make a note of how many questions you answer yes to.

This checklist will not take a lot of time, but its results can help you assess your financial health and gain clarity on steps to make a dramatic difference in the way you use money to live your path to financial comfort and freedom.

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12-Point Personal Financial Fitness Checklist

(Yes / No) (Answer all questions)

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- ☐ Are you using more and more of your income to pay your debts?
- ☐ Do you make only the minimum payments due on your loans and credit cards each month?
- ☐ Are you near, at, or over the credit limit on your credit cards?
- ☐ Are you paying your bills with money intended for other things?
- ☐ Are you borrowing money or using credit cards to pay for things you used to buy with cash?
- ☐ Do you often pay your bills late?
- ☐ Are you dipping into your savings to pay current bills?
- ☐ Do you put off visits to the doctor or dentist because you can't afford them?
- ☐ Has a collection agency called recently about overdue bills?
- ☐ Are you working overtime or holding a second job to make ends meet?

☐ If you or your spouse lost your job, would you be in financial trouble right away?

☐ Do you worry about money a lot?

☐ ----- *END* -----

☐ My Total "Yes" = -----(out of 12)

☐ My Total "No" .. -----out of 12

☐ *See Your Results BELOW >>>>>>>*

☐

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(spending, savings, debt destruction, investment & retirement plans)

Results:

If you answered **"no" to all questions:** you're the picture of financial health.

One or two "yes" answers: a warning sign of potential problems. Before things get worse, draw up a realistic budget or revise your spending plan. Cut back on credit cards, spend carefully.

Three to five "yes" answers: you're heading for trouble. Get your spending under control right away. Make / revise a monthly budget & follow it. Put away your credit cards & cut all unnecessary spending until you can answer "no" to all Qs.

"yes" to more than five of the questions: you're already in serious trouble. But don't despair. Start the road to recovery here:

Whatever your result, I would love to help you. Just click the button below for direct access to my calendar.

FREE Coaching Call 1:1 -60 mins Book HERE

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