

## IS THE FNA FOR YOU?

Get a Quick Checkup with this Quick Questionnaire

Life can have a way of letting us stray from even the best-laid plans. And even those who think everything is going well may be surprised to find out they've overlooked something. Remember, most people don't plan to fail - they just fail to plan.

Take this simple quiz to find out if you are headed where you want to go:

### 1. What will you live on during retirement?

- A) I'm investing and saving for my future.
- B) I figure I'll save a little and then count on Social Security benefits for the rest.
- C) I haven't thought that far ahead.

### 2. If anything were to happen to you, how would your expenses be paid?

- A) I have an individual life insurance policy.
- B) I have a group life policy through my job.
- C) I don't like to think about that kind of stuff.

### 3. How much have you saved for emergencies?

- A) I have at least three months income stashed away.
- B) I put away a little each month, but I always end up spending it.
- C) Are you kidding?! Who has enough to save?

### 4. How much debt do you have?

- A) I have "good" debt: a mortgage payment and not much else.
- B) I have a few credit cards, but I'm working on paying them off.
- C) Don't even get me started!

### 5. How do you handle legal questions?

- A) I call my lawyers. They know what to do.
- B) I check out one of those online legal advice sites.
- C) I figure it will all work itself out.

## Answer Key

If you answered:

**-Mostly A's** - Your financial future is looking good! You understand that unexpected expenses happen, and you're ready for them. A free FNA from [Elevate Your Wealth](#) can show you what you're doing right, ways that you could make your money work better for you and how to protect your assets!

**-Mostly B's** - You're on your way! But, you could still do more. Call a representative to schedule your complimentary FNA and learn how you can take that start and make your way to financial independence. You can do it!

**-Mostly C's** - Maybe you've had some financial hiccups. But, there's hope. We can help you create a program to get you back on track. Plus, we can connect you with legal professionals who may be able to help protect your resources as you regain control of your finances. The first step is your Financial Needs Analysis. The good news is, you can turn your finances around.

- [Do You Know Your FIN?](#)

One number could make or break your goals for the future. It's called a Financial Independence Number (FIN). This figure is the key to how you will spend the rest of your life. It represents how much you will need for monetary obligations, including your expenses during retirement.

-Get your Financial Independence Number through the free, personalized FNA. Besides, you can't