



Financial Confidence & Legacy Quiz

Instructions: For each question, rate yourself on a scale of 1 to 5, where:

- 1 = Not at all confident / Never considered it
- 2 = Somewhat concerned but not addressed
- 3 = Average / Somewhat confident
- 4 = Strong effort in place
- 5 = Fully confident / Completely addressed

1. Will your money truly last a lifetime through all market fluctuations— or could you outlive your savings? [1][2][3][4][5]

2. When was the last time someone reviewed your financial plan to protect you from surprises? [1][2][3][4][5]

3. Do you know your real “magic number” — the amount you’ll need to retire without worry? [1][2][3][4][5]

4. Are you confident that you won’t lose 50% or more of your hard-earned income to hidden tax traps? [1][2][3][4][5]

5. Is building (or protecting) generational wealth a priority for you — or is your legacy at risk? [1][2][3][4][5]

6. What would happen to your family if your assets were forced into probate tomorrow?

[1][2][3][4][5]

Your Score: Add up your points: _____ / 30



Results Snapshot:

- 25–30: Excellent — you’ve built strong financial confidence.
 - 18–24: Solid foundation, but there are gaps worth reviewing.
 - 12–17: Warning signs — action is needed soon.
 - 6–11: High risk — your financial future and legacy may be vulnerable.
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If at any point during this quiz you felt uncomfortable or uneasy, let’s schedule some time to talk. Don’t fret — I can help. This is why we should meet: together we can review your situation, bring clarity, and give you peace of mind about your financial future.

Schedule s 30-minute no-cost call with me to discuss your financial concerns. There is no obligation and all information is confidential.

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