



# **FITNESS FINANCE ASSESSMENT**

# FITNESS FINANCE ASSESSMENT

Many Fitness and Health Professionals are great at assessing clients and patients but not so great at assessing their personal finances. Take the following 6 question assessment and then see what your scores mean.

## Rate the following 6 questions 1-5.

1 would mean it's never true, 5 always true, or anywhere in between.

*The more honest you are, the more the assessment will help.*

\_\_\_\_\_ I have clearly defined and written goals for my finances.

\_\_\_\_\_ Each month I have a clear spending plan/budget (written or digital) before the month starts that I follow.

\_\_\_\_\_ If married: I have clear and open communication about finances with my spouse. Together, we discuss and develop a spending plan and other financial decisions. If single: I have somebody that I'm accountable when it comes to a spending plan, major financial decisions, etc.

\_\_\_\_\_ I have no non-mortgage debt. Debt is any money you owe someone (e.g. credit cards, student loans, friend/family loans, medical bills, car lease, car payment, etc.).

\_\_\_\_\_ You can easily access cash in case of an "unexpected event" and it wouldn't disrupt your life. Think major car repair, health issue, etc.

\_\_\_\_\_ You consistently treat yourself with things and experience you enjoy. You do these things because you want to and not to impress anyone.



# WHAT YOUR SCORES MEAN

## MOSTLY 1s AND 2s

You are likely not on track to win with your personal finances. It's possible that you are working really hard but don't have the direction you need. The fact that you took this assessment is **AWESOME** and shows that you want more. Think about some of the areas you can improve upon. Identify a friend, coach, or mentor who can support you as you take your next steps.

## MOSTLY 2s AND 3s

You are making progress but you are likely not reaching your full potential. You understand the importance of having a plan and executing on it. What adjustments might you need to make to go from good to great? Which of the areas do you most need to get dialed in?

## MOSTLY 4s AND 5s

You are in a good place or at least on track to be when it comes to personal finances. You are disciplined in some of the key areas needed to achieve financial freedom. Let me encourage you to take some time and put on paper why you are finding success and what you need to do to continue doing so. Consider it your responsibility to teach these principles and disciplines to those you lead. What is one additional step you can take so that you can get to the next level?