

Empowered Scorecard



Name: _____

Date: _____

To help you clearly understand your current situation, try *The Empowered Future Scorecard™*. Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 10. Add up your total from each column. Speak to one of our Empowered Future Advisors to understand the significance your score.

No clear vision of my future	1	2	3	4	5	6	7	8	9	10	Clear vision of my future
No strategies/resources to achieve my financial life goals	1	2	3	4	5	6	7	8	9	10	I have the strategies and resources I need to achieve my financial and life goals
No step-by-step action plan to achieve my retirement goals	1	2	3	4	5	6	7	8	9	10	I have a step-by-step plan to achieve my goals
Lack energy, suffer ill-health, and/or don't spend time on important relationships	1	2	3	4	5	6	7	8	9	10	I take time to stay in shape, enjoying good health/close relationships
Investments are scattered, disorganized, and unbalanced	1	2	3	4	5	6	7	8	9	10	My portfolio is integrated, organized, and well diversified
Lack motivation/don't know how to spend time	1	2	3	4	5	6	7	8	9	10	Have clear priorities, interests and how I invest my time
Important legal/estate documents out of date, inappropriate or non-existent	1	2	3	4	5	6	7	8	9	10	My legal/estate documents are current, appropriate and clearly express my final wishes
No vision, plan, or progress review	1	2	3	4	5	6	7	8	9	10	I review my vision, plan, and progress regularly
Conflicting advice from a variety of sources	1	2	3	4	5	6	7	8	9	10	I have a single source of trusted financial advice
Low confidence in the future	1	2	3	4	5	6	7	8	9	10	Strong sense of confidence about my future
ADD COLUMN TOTALS											MY SCORE _____