

FINANCIAL FEARS SURVEY

This survey is designed to help you explore your feelings and anxieties surrounding money. By identifying your financial fears, we can work together to develop a plan that addresses your concerns and builds financial confidence.

Please rate each statement below based on how much it resonates with your current financial situation.

Fear of Running Out of Money	Not at all afraid	Slightly afraid	Moderately afraid	Very afraid	Extremely afraid				
I worry that I won't have enough money to retire comfortably	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc				
I fear a medical emergency will wipe out my savings	\bigcirc	\bigcirc		\bigcirc					
The rising cost of living makes me anxious about affording basic necessitie	s	\bigcirc	\bigcirc						
Fear of Making Bad Financial Decisions									
I'm afraid of investing in the wrong things and losing money	\bigcirc	\bigcirc	\bigcirc		\bigcirc				
I worry that I don't have the financial knowledge to make sound decisions	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc				
Feeling overwhelmed by financial choice makes me hesitant to take any action	es 🔾	\bigcirc	\bigcirc	\bigcirc					
Fear of Debt and Loss of Control									
The burden of debt keeps me up at night	\bigcirc			\bigcirc					
I'm afraid of losing control of my finances and falling into debt	\bigcirc	\bigcirc	\bigcirc	\bigcirc					
Unexpected expenses make me feel anxious and out of control	\bigcirc		\bigcirc	\bigcirc	\bigcirc				
Fear of Judgement and Comparison									
I worry that my friends and family think I'm not good with money	\bigcirc		\bigcirc	\bigcirc	\bigcirc				
I feel pressure to keep up with the financial success of others	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc				
I'm embarrassed to discuss my financial situation with my advisor				\bigcirc	\bigcirc				

FINANCIAL FEARS SURVEY - CONTINUED

Fear of the Unknown	Not at all afraid	Slightly afraid	Moderately afraid	Very afraid	Extremely afraid			
The uncertainty of the future financial landscape makes me anxious	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc			
I'm afraid of economic downturns and market volatility	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc			
Major life changes (illness, job loss) make me fearful about my financial security	e	\bigcirc	\bigcirc	\bigcirc	\bigcirc			
Loss of Legacy								
I worry about preserving my wealth for future generations	\bigcirc	\bigcirc		\bigcirc	\bigcirc			
The thought of my wealth diminishing makes me anxious	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc			
Tax Burdens and Complexities								
I'm afraid of making mistakes that could result in large tax liabilities		\bigcirc	\bigcirc		\bigcirc			
Complex tax laws makes me anxious about managing my wealth effectively	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc			
Investment Risks								
A significant market downturn could drastically impact my lifestyle	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc			
I worry about making investment decision that could erode the value of my portfolio		\bigcirc	\bigcirc	\bigcirc	\bigcirc			
Estate Planning								
I worry my estate plan isn't comprehensive enough to protect my beneficiaries	ve 🔾	\bigcirc	\bigcirc	\bigcirc	\bigcirc			
I worry my estate plan will lead to conflict among my beneficiaries	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc			
Additional Notes: Please use this space for any other financial fears you may have.								

Thank you! By understanding your fears, we can develop a clear roadmap to address them and help you reach your long-term goals.