

Personal checklist 6

1. Do you and your spouse have an agreed budget?	20pts
Yes	0 pts
No	
2. Are your investments spread so that you do not have "all your eggs in one basket"?	20pts
Yes	0 pts
No	
3. Is your income coming from several sources so that you are not relying on just one?	20pts
Yes	5 pts
No	
4. Are your financial records up to date and is a summary held by both you and your spouse?	20pts
Yes	0 pts
No	
5. Do you have an up to date will?	20pts
– Both partners	10pts
– One partner	
6. Do you have goals for the near future written down?	20pts
– Both partners	10pts
– One partner	

Now total your points
