moneyzen®
WEALTH MANAGEMENT, LLC

PRESENTED BY
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2013 WPS Retreat in Las Vegas, NV

Session #1: Know Your Worth

8:30am – 9:50am

S I M P L I F Y Y O U R F I N A N C E S , S I M P L I F Y Y O U R L I F E .

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Client Name ______________________________ Date ______________

Directions: *The purpose of this worksheet is to clarify what is most important to you. This awareness, in turn, will provide an effective framework for creating plans and making important life decisions. Please take a few minutes to reflect on each question and give thoughtful consideration to your responses.*

(1) How do you define success in your working life?

(2) How do you define success in your family life?

(3) How do you define success in your financial life?

(4) How do you define balance in your life?

(5) How do you hope to be remembered someday?

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Directions: *The statements below will help you to think about and assess how satisfied you are with many aspects of your financial life. Select and record your level of satisfaction for each statement.*

I am satisfied…

	NOT SATISFIED 1	2	MODERATELY SATISFIED 3	4	VERY SATISFIED 5
1…with my ability to meet my financial obligations.					
2…with the income my current job or career provides me.					
3…with my spending habits.					
4…with the level of debt I carry.					
5…with the “extras” that I am able to buy for myself and/or loved ones.					
6…with the level and quality of insurance protection I currently have.					
7…with the amount of money that I save and invest on a regular basis.					
8…with my current investment choices.					
9…that I am on track to build a sufficient retirement nest egg.					
10…with the level of employee benefits I receive.					
11…with my style of personal bookkeeping and financial record management.					
12…with my ability to provide financial help to family members.					
13…with my estate plan.					
14…with my level of charitable giving.					
15…with the level of financial education I have attained.					
16…with how I respond emotionally to my personal finance issues.					
17…with my ability to communicate about my financial matters.					
18…with the feelings I have about my money life.					
19…that financial issues do not cause stress or strain in the relationships that are important to me.					
20…with the working relationships I have with my financial service providers (i.e., insurance agent, banker, broker, financial planner, accountant).					

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Simple Financial Statement

Client Name ______________________________ Date ________________

Annual Income

	YOU	SPOUSE / PARTNER
Salary & Bonuses		
Interest & Dividends		
Other Income (gift, trust, rental income, money owed to you, etc.)		
Total		

Annual Savings (how much you save per year)

	YOU	SPOUSE / PARTNER
Retirement Plan Contributions (401K, IRA, etc.)		
Other Savings		
Total		

Assets (what you own)

	YOU	SPOUSE / PARTNER
Current/Average Amount in Checking Accounts		
Current Amount in Savings Accounts		
Money Market Accounts		
Certificates of Deposit (CDs)		
Total Stocks/Bonds/Mutual Funds		
Insurance and Annuities (cash value)		
Home Value		
Ownership or Partnership share of company (if sold today)		
Other Real Estate		
Automobiles, boat		
Other assets (jewelry, artwork, collections, etc.)		
Total		

Debts/Liabilities (what you owe to others)

	YOU	SPOUSE / PARTNER
Credit Cards		
Mortgage(s)		
Automobile Loans		
Education Loans		
Investment Loans		
Life Insurance Loans		
Other Loans (personal, business, boat, etc.)		
Total		

07-20-09