

# What's my financial personality?

Take this questionnaire to find out!

What's your **why**? Identifying your financial personality will allow you to better understand your particular needs, making your decision-making processes and personal approach to planning your financial future so much smoother. This way, you can also be better understood by your investor coach.

Using the following scale, how much do you agree or disagree with the following statements?

strongly agree <b>5 POINTS</b>	somewhat agree <b>4 POINTS</b>	neutral <b>3 POINTS</b>	somewhat disagree <b>2 POINTS</b>	strongly disagree <b>1 POINT</b>
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I feel I am confident when it comes to managing money and investing.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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I feel I have adequately planned for retirement savings/security.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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I feel I am educated when it comes to managing money and investing.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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I feel I have sufficient knowledge about money and investing, and I am very involved in the management of my long-term savings and investments.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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I feel I am clear about my financial goals and my plans to achieve them.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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I feel I am highly responsible and take initiative when it comes to money and investing.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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It is very important to me that I always have a complete understanding of my household financial situation.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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When in a relationship, I like to collaborate with my partner in financial decisions.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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**TOTAL POINTS:**

# What's your personality?



**PRESENTED BY**

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## **TOTAL POINTS**

35 to 40 — Financial Initiator (the Alpha Female)

27 to 34 — Financial Analyzer (the Perceptive Planner)

20 to 26 — Financial Collaborator (the Power Partner)

14 to 19 — Financial Avoider (the Uncertain Searcher)

8 to 13 — Financial Dreamer (the Supportive Traditionalist)

## The emerging roles of financially empowered women:

Thank you for completing our financial personality questionnaire! We hope this gives you a better understanding of your unique financial personality, and how you can become more in tune with your behaviors as they relate to money and finances. The goal is to help you assume better control of your financial future. To help you interpret your results, remember that you are the best judge of the accuracy of a personality description that reflects your financial behavior. Perhaps you may also feel that you are a combination of two different types. Take a look at the descriptions that follow to see how you line up with them, and what changes you might like to make in the future.

### #1 – Financial initiator – **the Alpha Female**

You're self-assured, empowered and optimistic in most of your endeavors. Specifically, you feel that you are extremely sophisticated in your financial knowledge and confident in your ability to make independent, informed financial decisions. You're quite clear about your financial goals and typically know how to achieve them. You take the initiative to work with a financial professional who you feel has the necessary industry experience and expertise to provide you exceptional advice and guidance.

### #2 – Financial analyzer – **the Perceptive Planner**

You have a good understanding of household finances and take initiative in thoroughly researching investment opportunities and tracking financial results. You're a comparison shopper, an avid saver and rarely purchase something you can't afford. Your behavior is reflective of an analytical and disciplined approach to making decisions. Chances are you've worked with a financial professional in the past. However, when selecting a financial professional, it's important to you to work with someone who is inclusive and collaborates with you.

### #3 – Financial collaborator – **the Power Partner**

You're extremely balanced in your life. When in a relationship, you're healthy, happy and cooperative. You provide your family financial comfort & stability. You are confident with your ability to understand and resolve financial issues. However, you prefer not to be the primary decision-maker. Even though you may not always choose to be in the forefront, you and your partner share equally in all financial decisions and actions including working with a financial professional.

### #4 – Financial avoider – **the Uncertain Searcher**

You're concerned about your current finances and your financial future. However, you don't feel confident enough with your financial knowledge to make informed, independent decisions to resolve your financial problems. You often feel overwhelmed by all the choices and potential solutions available to you. You know that you would benefit by seeking the help of a financial professional. You just have trouble taking the first step, and WHO you would trust!

### #5 – Financial dreamer – **the Supportive Traditionalist**

You haven't had a confident history with money, you haven't been responsible for your own money, and you feel intimidated when it comes to managing your own finances. Because you lack experience and knowledge, you may feel helpless and hope someone else will "take care of it for you". In fact, you usually defer all financial matters to your partner. You have the most to gain by finding a trusted financial professional that can help you out of this dilemma!