



HOW ARE YOU DOING? Goal Check-Up

A goal checkup is as important as a physical checkup. A regular check of financial health can identify problems, chart progress, and outline action steps to achieve goals. It can also provide motivation to change.

Read the statements below and rate yourself using the rating scale. Discuss your ratings with your instructor.

5 = yes or always

4 = usually

3 = sometimes

2 = seldom

1 = never (or no, or don't know)

_____ 1. I have written goals.

_____ 2. I know where my goals are located.

_____ 3. I have looked at my goals in the last 3 months.

_____ 4. I have short term, long term, and intermediate goals.

_____ 5. I am using my goals to guide my business and personal practices.

_____ 6. I have made progress toward my goals in the last year.