

| <b>FINANCIAL SECURITY REPORT CARD</b>               |             | A = Accomplished R = Reviewed/Revised |             |             |             |
|---|-------------|---------------------------------------|-------------|-------------|-------------|
| <b>EXAMPLE</b>                                      | <b>2002</b> | <b>2003</b>                           | <b>2004</b> | <b>2005</b> | <b>2006</b> |
| Identify Financial Needs                            | A = 11/03   |                                       | R = 2/22    |             |             |
| <b>PLAN</b>   | <b>2002</b> | <b>2003</b>                           | <b>2004</b> | <b>2005</b> | <b>2006</b> |
| Identify Financial Values                           |             |                                       |             |             |             |
| Identify Financial Attitudes                        |             |                                       |             |             |             |
| Develop Written Goals                               |             |                                       |             |             |             |
| Identify Financial Needs                            |             |                                       |             |             |             |
| Understand Healthy Money Communications             |             |                                       |             |             |             |
| Have a Money Meeting With Family                    |             |                                       |             |             |             |
| Identify Risk Factors related to Financial Security |             |                                       |             |             |             |
| Identify Long Term Care Options                     |             |                                       |             |             |             |
| <b>ACT</b>  | <b>2002</b> | <b>2003</b>                           | <b>2004</b> | <b>2005</b> | <b>2006</b> |
| Track Spending                                      |             |                                       |             |             |             |
| Develop Budget/Spending Plan                        |             |                                       |             |             |             |
| Current, Valid Will                                 |             |                                       |             |             |             |
| Prepare Advance Directive for Health Care           |             |                                       |             |             |             |
| Financial Inventory                                 |             |                                       |             |             |             |
| Inventory of Important Papers                       |             |                                       |             |             |             |
| Family Net Worth Statement                          |             |                                       |             |             |             |
| Estimate Retirement Income                          |             |                                       |             |             |             |
| Estimate Retirement Expenses                        |             |                                       |             |             |             |
| Organize Financial Records                          |             |                                       |             |             |             |
| Increase Personal Savings                           |             |                                       |             |             |             |
| Reduce Debt   |             |                                       |             |             |             |
| Join an Investment Club                             |             |                                       |             |             |             |
| Investment Goals Identified                         |             |                                       |             |             |             |
| Emergency Savings Available                         |             |                                       |             |             |             |
| Participation in Employer-Provided Retirement Plus  |             |                                       |             |             |             |
| Develop Plan for Long Term Care                     |             |                                       |             |             |             |
| <b>EVALUATE</b>                                     | <b>2002</b> | <b>2003</b>                           | <b>2004</b> | <b>2005</b> | <b>2006</b> |
| Current Estate Plan                                 |             |                                       |             |             |             |
| Insurance Needs                                     |             |                                       |             |             |             |
| Appoint a Power of Attorney                         |             |                                       |             |             |             |
| Property Ownership                                  |             |                                       |             |             |             |
| Health Insurance Options                            |             |                                       |             |             |             |

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| Identify Financial Values                           |             |                                       |             |             |             |
| Identify Financial Attitudes                        |             |                                       |             |             |             |
| Develop Written Goals                               |             |                                       |             |             |             |
| Identify Financial Needs                            |             |                                       |             |             |             |
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| Identify Long Term Care Options                     |             |                                       |             |             |             |
| <b>ACT</b>  | <b>2002</b> | <b>2003</b>                           | <b>2004</b> | <b>2005</b> | <b>2006</b> |
| Track Spending                                      |             |                                       |             |             |             |
| Develop Budget/Spending Plan                        |             |                                       |             |             |             |
| Current, Valid Will                                 |             |                                       |             |             |             |
| Prepare Advance Directive for Health Care           |             |                                       |             |             |             |
| Financial Inventory                                 |             |                                       |             |             |             |
| Inventory of Important Papers                       |             |                                       |             |             |             |
| Family Net Worth Statement                          |             |                                       |             |             |             |
| Estimate Retirement Income                          |             |                                       |             |             |             |
| Estimate Retirement Expenses                        |             |                                       |             |             |             |
| Organize Financial Records                          |             |                                       |             |             |             |
| Increase Personal Savings                           |             |                                       |             |             |             |
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| Join an Investment Club                             |             |                                       |             |             |             |
| Investment Goals Identified                         |             |                                       |             |             |             |
| Emergency Savings Available                         |             |                                       |             |             |             |
| Participation in Employer-Provided Retirement Plus  |             |                                       |             |             |             |
| Develop Plan for Long Term Care                     |             |                                       |             |             |             |
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| Current Estate Plan                                 |             |                                       |             |             |             |
| Insurance Needs                                     |             |                                       |             |             |             |
| Appoint a Power of Attorney                         |             |                                       |             |             |             |
| Property Ownership                                  |             |                                       |             |             |             |
| Health Insurance Options                            |             |                                       |             |             |             |