

FINANCIAL FEARS SURVEY

This survey is designed to help you explore your feelings and anxieties surrounding money. By identifying your financial fears, we can work together to develop a plan that addresses your concerns and builds financial confidence.

Please rate each statement below based on how much it resonates with your current financial situation.

Fear of Running Out of Money	Not at all afraid	Slightly afraid	Moderately afraid	Very afraid	Extremely afraid
I worry that I won't have enough money to retire comfortably	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I fear a medical emergency will wipe out my savings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The rising cost of living makes me anxious about affording basic necessities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fear of Making Bad Financial Decisions

I'm afraid of investing in the wrong things and losing money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I worry that I don't have the financial knowledge to make sound decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feeling overwhelmed by financial choices makes me hesitant to take any action	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fear of Debt and Loss of Control

The burden of debt keeps me up at night	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'm afraid of losing control of my finances and falling into debt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unexpected expenses make me feel anxious and out of control	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fear of Judgement and Comparison

I worry that my friends and family think I'm not good with money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel pressure to keep up with the financial success of others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'm embarrassed to discuss my financial situation with my advisor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FINANCIAL FEARS SURVEY - CONTINUED

Fear of the Unknown

	Not at all afraid	Slightly afraid	Moderately afraid	Very afraid	Extremely afraid
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The uncertainty of the future financial landscape makes me anxious

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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I'm afraid of economic downturns and market volatility

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Major life changes (illness, job loss) make me fearful about my financial security

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Loss of Legacy

I worry about preserving my wealth for future generations

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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The thought of my wealth diminishing makes me anxious

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Tax Burdens and Complexities

I'm afraid of making mistakes that could result in large tax liabilities

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Complex tax laws makes me anxious about managing my wealth effectively

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Investment Risks

A significant market downturn could drastically impact my lifestyle

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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I worry about making investment decisions that could erode the value of my portfolio

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Estate Planning

I worry my estate plan isn't comprehensive enough to protect my beneficiaries

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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I worry my estate plan will lead to conflict among my beneficiaries

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Additional Notes: Please use this space for any other financial fears you may have.

Thank you! By understanding your fears, we can develop a clear roadmap to address them and help you reach your long-term goals.