



## Return on Life Self-Assessment

*Linking your core values & goals with that of your financial path.*

Let's get you thinking about how your life and goals align with your money mindset. Consider your answers to the questions below, reflecting on what is important to YOU.

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**Do you feel you are compensated well (financially or otherwise) for the work that you do (employment, volunteering, charitable work, caregiving, etc.)?**

**Do you work because you enjoy what you do, or because it pays the bills?**

**Do you feel you have control over your finances (income, savings, debt)?**

**Do you find time for yourself and in your ability to maintain a healthy lifestyle?**

**Are you pleased with your accomplishments in life?**

**If you passed away tomorrow, would you have any regrets?**

**If money was no object, how and with whom would you spend your time?**

**Do you live within your means, below your means or spend freely?**

**What freedoms or positive life change would financial independence create for you?**

**Do you have the same thoughts about money (spending, saving, debt) as your spouse/partner?**

**Are you doing everything within your power to live your best life?**

**How do you define being “wealthy”?**

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Ready to learn more? Call, email, or check out our website for valuable resources and a listing of our upcoming free educational classes. Then, reach out (or scan below) to take advantage of our no cost, no obligation Financial Wellness Checkup! Stop waiting for the “right time” – call us today!

**Phone:** [\(314\) 353-9924](tel:3143539924)

**Scan below (with your phone camera) to schedule your FREE Financial Wellness Checkup today!**

**Email:** [Lisa@ARKFinancialWellness.com](mailto:Lisa@ARKFinancialWellness.com)

**Website:** [ARKFinancialWellness.com](http://ARKFinancialWellness.com)



***“Be PROACTIVE versus REACTIVE in life because it’s never too late to create a plan to get you where you REALLY want to be.”***

***- Lisa Avenevoli, CFP®, CMFC***