

UBwell



Personal Financial Wellness Assessment

	Rarely, if ever	Sometimes	Most of the time	Always
1 I always have the money for what I need.	1	2	3	4
2 I review my bank statements when I receive them.	1	2	3	4
3 I pay all of my bills on time.	1	2	3	4
4 I balance or reconcile by bank accounts regularly.	1	2	3	4
5 I keep my Social Security Card or number in secure place.	1	2	3	4
6 I save part of my income every time I receive any money.	1	2	3	4
7 I pay my credit card bill off completely every month.	1	2	3	4
8 I check my credit report to look for any errors.	1	2	3	4
9 I follow a spending plan every month.	1	2	3	4
10 Every time I get a new debit card I change the PIN (Personal Identification Number).	1	2	3	4
Total				
Maximum Score: 40				

After completing this assessment I was surprised to learn:

I was disappointed that:

Things I am currently doing to help improve my physical wellness are:

Things that I will do differently or change to make my physical wellness a priority are:
