



Are you financially fit?

Be a part of our Financial Fitness Week! November 26th - 30th

Achieve financial fitness in three easy steps:



Step 1. *Take our brief survey to determine your financial fitness level.*



Step 2. *Meet with one of our Personal Bankers to discuss and improve your Financial Health.*



Step 3. *Let us work with you to achieve and sustain your financial fitness goals.*





Are you financially fit?

Your level of financial fitness may have an impact on your health, so consider it as part of your overall wellness plan. This short questionnaire will help you determine how financially fit you are.

Name: Phone:

Email address: Date:



What are your top 2 financial goals?

- Saving for a comfortable retirement
- Children's education savings
- Paying off mortgage
- Buying a property
- Buying a car
- Paying off debts - credit card etc
- Paying less tax on investments
- Other

Help us get to know you better



	3	2	1	POINTS
	Yes	Kind of	Not yet	
Do you have a written, customized financial plan to help you achieve your goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Do you invest/save regularly and automatically?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Do you have emergency savings set aside?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Do you have a current, written Will?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Do you pay your obligations on time - credit card, loans?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Do you understand the costs of your investments?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

What's your financial fitness level?

Work with your Personal Banker to get, and stay, financially fit!

6	7-10	11-14	15-18	TOTAL
Just starting	Gaining momentum	Getting close	Fit!	<input type="checkbox"/>

Let us help you become better off. Speak to your Personal Banker today.

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