



SHEknows Financial Knowledge and Preparedness Quiz

	Y/N	
1		I know my Will/Power of Attorney/Representation Agreement(s) is up to date
2		I know that our/my Executor knows where to locate all of our important information and documents
3		I know my mortgage payment and repayment schedule
4		I know how/when to reduce the term of my mortgage
5		I know how much life insurance protection I/we have to cover income protection and debts including my mortgage
6		I know what my/spouse's employee benefits plan covers
7		I know how much disability and/or critical illness insurance I/we have in place
8		I know the details of all insurance policies I/we have
9		I know the details of the home/contents insurance
10		I know that I/we review our insurance policies (life/disability/critical illness/home/auto) every year with our advisors
11		I know the location and amounts of all investments
12		I know the financial objectives/strategies for my/our investments
13		I know I/we meet with our advisor every year to review our investment strategies/returns
14		I know the annualized returns on my/our investments
15		I know what my/our spending and savings plan is and review this every year
16		I know I/we have an emergency fund
17		I know the contents of our safety deposit box, key location
18		I know I have taken advantage of all new tax strategies available such as the new Tax Free Savings Account
19		I have created a summary of all of my insurance and investment accounts, keep it current, and have advised my executor where it is located.