

PERSONAL EDITION:

**A 60-SECOND PERSONAL FINANCIAL WELLNESS AUDIT FOR REALTORS®
AND THEIR FAMILIES**

To help benchmark your personal financial condition as you enter this business, the Center for REALTOR® Financial Wellness invites you to take this 60-Second Wellness Audit. Your responses will help gauge how prepared you are with your finances.

	YES	NO / UNSURE
Have you assessed how much in savings and other household income you have available to cover personal expenses while launching your business?	<input type="checkbox"/>	<input type="checkbox"/>
Given the higher need for liquidity and capital when launching a business, have you updated your current investments' asset allocation?	<input type="checkbox"/>	<input type="checkbox"/>
Is your overall financial plan current and reviewed annually? Are you aware of the most current planning strategies?	<input type="checkbox"/>	<input type="checkbox"/>
Do you own alternative investments (<i>real estate, loans, currency</i>) and similar strategies that could potentially reduce portfolio volatility?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know if you own too much, too little, or just enough life insurance?	<input type="checkbox"/>	<input type="checkbox"/>
Will your health insurance provider, coverage, cost, or needs changed?	<input type="checkbox"/>	<input type="checkbox"/>
Has your estate plan been reviewed by a licensed professional in the past five years, or recently if there have been changes involving people in your family, people listed in the documents, or assets?	<input type="checkbox"/>	<input type="checkbox"/>
Have you prepared for potential long-term care needs as you get older?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know how you can use your real estate business to reduce the cost of personal long-term care?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know how much you will need to save between now and when you declare financial independence, to preserve your current standard of living?	<input type="checkbox"/>	<input type="checkbox"/>

If you answered [Yes] to all questions, then congratulations! See how you rated on the Financial Wellness Audit chart. Regardless of your score, it is never too late to strengthen your business!

The National Association of REALTORS® proudly introduces the Center for REALTOR® Financial Wellness, an online resource designed to meet the specific financial planning needs of REALTORS®.

This complimentary program provides budgeting tools, retirement planning resources, options for investing in real estate and more. Log-in to FinancialWellness.realtor to take an assessment and start planning today!