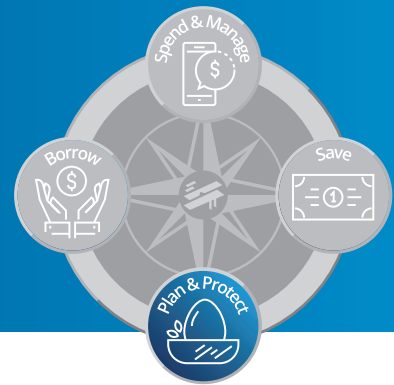


PLANNING AHEAD INVENTORY



How are you planning ahead today? What do you feel is stopping you?

What large expenses do you have?

Answer the following questions using "yes" or "no".	Yes	No
Have you established a rainy day savings?		
Do you have large, irregular income moments?		
Do you use any planning tools currently to help manage your finances and planning?		
Do you have small savings set up through auto-transfer, deposits?		
Do you have multiple accounts set up for different types of expenses (i.e. medical, health savings, home maintenance, taxes, vacations, holidays)?		

For informational purposes only.