

HELP US GET TO KNOW YOU BETTER

What information about you would you like to share ?

Tell us about your family(optional)

Are you working? ____ If yes, tell us about your job/business, also include what you like most and dislike.

Any other stressors in your life that you think will prohibit your financial wellness journey?

What is the area of your life you are most proud of?



Triangle Family Services

"Building a better community, by strengthening the family"
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What is financial wellness?

“A healthy mindset in the way you think about money that aligns with the way you use money”.

This is your financial journey so tell us about your relationship with money...

1. What are your thoughts about money? Please explain
2. Do you think the issue is that you do not have enough? Please explain
3. Do you believe the issue could be lack of knowledge on how to manage money? Please explain
4. Are you confident and willing to stick with the process to achieve your financial goals? Please explain
5. If you were to rate your financial behavior on a scale from 1-100. How would you rate yourself?



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