

# Financial Feelings Survey

*Read each statement and rate how you feel now.  
Then comment about why you feel this way.*

1 = I feel confident about this area

2 = I feel neutral about this area

3 = I feel uncertain or fearful about this area

Here's how I feel about:	Rating
1. My ability to manage my financial situation as a widow. COMMENTS:	
2. My ability to think clearly about money matters. COMMENTS:	
3. What I spend money on. COMMENTS:	
4. Knowing what to do with money from my husband's life insurance and other sources after his death. COMMENTS:	
5. My emotional responses to money issues. COMMENTS:	
6. My understanding of financial matters. COMMENTS:	
7. Income from my job and/or retirement income sources. COMMENTS:	
8. My financial investments. COMMENTS:	
9. Knowing I have enough money for my retirement years now or in the future. COMMENTS:	
10. Work I'm currently doing, either for pay or as a volunteer. COMMENTS:	
11. My financial recordkeeping and organization. COMMENTS:	
12. My ability to give financial help to family members if they need assistance. COMMENTS:	
13. My estate plan. COMMENTS:	



REFLECTION EXERCISES

Here's how I feel about:	Rating
14. Talking about financial matters with a family member. COMMENTS:	
15. My insurance protection. COMMENTS:	
16. My debts. COMMENTS:	
17. My charitable giving. COMMENTS:	
18. My financial goals. COMMENTS:	
19. How much stress money matters cause me. COMMENTS:	
20. Professional relationships with my insurance agent, banker, financial planner, broker, tax preparer or other financial professional. COMMENTS:	

**What do your responses indicate?**

◆ Which area(s) do you feel most confident about? \_\_\_\_\_  
\_\_\_\_\_

◆ What's an area(s) you want to improve in? \_\_\_\_\_  
\_\_\_\_\_

◆ Write one thing you could do to help you feel more secure about your money life.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*For example, if you feel uncertain about your estate plan, it may be time to update your will.*

◆ Circle any areas you rate as a "3," and talk about these with someone you trust. If you are in a widow's support group, ask other women how they are dealing with their misgivings about finances.

