



## Money & Wealth Questionnaire

### Part One

*How truthful do these beliefs feel to you? Assign a number to each statement on a scale of 1-10. (10 meaning you strongly believe the statement, 1 meaning you don't believe it at all.) Be honest with yourself and write down your first response without overthinking it.*

1. Work can be enjoyable and be performed in an easy manner. \_\_\_\_\_
2. I earn enough money to support myself. \_\_\_\_\_
3. I easily receive money for the work that I perform. \_\_\_\_\_
4. My talents and gifts are appreciated and valued by society. \_\_\_\_\_
5. I am deserving. \_\_\_\_\_
6. I live within my means. \_\_\_\_\_
7. I am valuable. \_\_\_\_\_
8. I am comfortable using my personal power. \_\_\_\_\_
9. I get paid what I'm worth. \_\_\_\_\_
10. I manage my money. \_\_\_\_\_
11. I feel supported in all that I do. \_\_\_\_\_
12. I have control over my income. \_\_\_\_\_
13. I allow myself to earn money easily. \_\_\_\_\_
14. I am comfortable investing. \_\_\_\_\_
15. I deserve to be rich. \_\_\_\_\_
16. There is enough money to go around. \_\_\_\_\_
17. I have power over my own life. \_\_\_\_\_
18. I feel abundance in my life. \_\_\_\_\_
19. I am comfortable with abundance. \_\_\_\_\_
20. I deserve to have money. \_\_\_\_\_
21. I am happy. \_\_\_\_\_
22. Money is important to me. \_\_\_\_\_
23. I am able to meet my own financial needs. \_\_\_\_\_
24. I invest my money. \_\_\_\_\_

*(continued on next page)*



## Money & Wealth Questionnaire (cont.)

25. I am successful. \_\_\_\_\_
26. I am comfortable being wealthy. \_\_\_\_\_
27. I feel a sense of lack in my life. \_\_\_\_\_
28. I live paycheck to paycheck. \_\_\_\_\_
29. Debt is a part of my life. \_\_\_\_\_
30. I am committed to changing my money beliefs. \_\_\_\_\_
31. I am committed to changing my financial future. \_\_\_\_\_

### Scoring Results:

**For questions 1-26, add up all the numbers to get your total score:**

- 0-87** You're "**A Beginner**" – You have limiting beliefs that are getting in the way of your financial success. You would greatly benefit from coaching and support.
- 88-174** You're "**A Work in Progress**" – Your beliefs need to be affirmed and strengthened in order to achieve financial success. You would greatly benefit from coaching and further support.
- 175-260** You're "**Almost There**" – You are well on your way to financial success. You just need to make some slight adjustments and a little coaching would get you there in no time.

**For questions 27-29, add up all the numbers to get your total score:**

- 0-9** You're "**Headed in the Right Direction**" – You are almost there. Just keep up the good work and coaching can help.
- 10-20** You're "**About to Change**" – You are halfway there and coaching can help you to further shift your beliefs.
- 21-30** You need to "**Get to Work**" – You need to work on these beliefs because they are preventing you from moving ahead. Coaching will support this process.

**For questions 30-31, add up all the numbers to get your total score:**

- 0-5** You're "**Not There Yet**" – You are not quite ready to take action.
- 6-12** You're "**Warming Up**" – You are preparing to go for it, so give Robin a call.
- 3-20** You're "**Ready to Go**" – You are in the zone. Contact Robin and let's get started!



Phoenix Life Coaching  
*Dream it. Live it.*

## Money & Wealth Questionnaire (cont.)

### Part Two

Answer the following questions in the space provided.

1. Why are you interested in changing the financial aspect of your life now?
2. How often do you worry about money? *Circle one:* Never    Occasionally    Often    Always
3. How do you feel about money?
4. How would you rate your “self worth”? *(On a scale of 1 to 10, 10 being highest)* \_\_\_\_\_
5. How do you feel about rich people?
6. What is the most difficult for you? *Rank the following 1, 2, and 3 (1 being the most difficult).*  
\_\_\_\_\_ Earning Money    \_\_\_\_\_ Keeping Money    \_\_\_\_\_ Investing Money
7. How long (days, months, years) can you afford to live without earning an income?

**To discuss and review your results, call Robin Gardner at Phoenix Life Coaching.**