

Year-End

FINANCIAL REVIEW

QUESTIONNAIRE



Year-end Financial Review

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Like how the annual stock-taking process helps the firms to get an exact inventory of goods, raw materials and work in progress, a year-end financial review helps you determine the progress you have made with your finances in a particular year.

1) Did you set financial goals at the beginning of the year 2018?

a. Yes

b. No

2. If yes, List your top 3 financial goals off 2018

i)

ii)

iii)

3. What is the status of financial goal 1?

i) Nailed it

ii) Yet to Start

iii) Abandoned halfway through

iv) Have made some progress

4. What is the status of financial goal 2?

- i) Nailed it
- ii) Yet to Start
- iii) Abandoned halfway through
- iv) Have made some progress

5. What is the status of financial goal 3?

- i) Nailed it
- ii) Yet to Start
- iii) Abandoned halfway through
- iv) Have made some progress

6. What were some of your biggest Unplanned or Impulsive expenses in 2018? (You can select more than one)

- A. Emergencies
- B. Vacation
- C. Electronics
- D. Car
- E. Jewellery
- F. Clothing

G. Others

7. If possible would you go back and not buy one or more of the above?

- a. Yes
- b. No

8. How would you rate your financial progress in 2018? Do you feel that you are ending this year in a...

- A. Better financial position
- B. Worse financial position

9. What financial accomplishment(s) are you proud of in 2018?

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10. What were your financial pitfalls in 2018?

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