



FINANCIAL FITNESS ASSESSMENT FORM

Invest a few minutes assessing your financial fitness and celebrate the potential rewards for life.

a) Personal Details

This Financial fitness assessment form is designed to assist you gain an overview of your current financial situation and highlight any areas that could benefit from more attention.

1. What is your occupation? _____
2. What is your age group? 20-30 years 30-40 years 40-50 years Above 50 years
3. What is your marital status? Single Married Widow/ widower other
4. How many financial dependents: do you have? 0-3 4-6 7-9 10 and above

b) The day to day (please tick one)

5. Do you have a regular income? Yes No Not Sure
6. What's your gross monthly salary (before tax)? _____
7. Do you have any other income (Investments, etc.)? _____
8. Are you able to save some money each time you are paid? Yes No Not Sure
Approx. Savings Kshs. _____ / Weekly / Monthly / Year.
9. Estimated monthly fixed Expenses: _____
10. How well do you survive on your income?
 Fine
 Not so good. I struggle to pay bills and never have any money left over.
 I have no idea where my money goes.



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11. What would you do if you needed money urgently?

- I could get it easily.
- I'd find it but it wouldn't be easy.
- I'd be in trouble; I wouldn't know where to get it from.

c) Planning Ahead

12. Do you have a vision of where you want to be in your financial life? Yes No Unsure

13. Are your goals written? Yes No Unsure

14. Are you confident about your financial future? Yes No Unsure

15. Are you I-tax compliant? Yes No Unsure

16. Please assess your net worth by filling in the following table

Components	Total Value in Kshs.
Investment Property 1	
Investment Property 2	
Cash in the bank	
Shares	
Fixed Deposit	
Mortgage	
Total Assets	



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Liabilities	
Car 1	
Personal Loan	
Others	
Total Liabilities	
Your net worth (Assets Less Liabilities)	

d) Loans /Mortgage / Sensible Borrowing

17. Do you have any loans/ Mortgage outstanding? Yes No Unsure

18. How are you coping with any loans / debts you have?

I don't have any borrowings.

No problems, I am up-to-date with the mortgage and don't have any other loans or money outstanding.

It's ok, I am up-to-date with the payments

I don't know how I will pay what is owed.

e) Retirement / Planning

19. What age do you plan to retire?

20. Do you dream of retiring early?

21. Do you know that you should invest but don't know where to start?



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22. Could you continue your current lifestyle if your spouse gets unemployed/ died tomorrow?
(Maintaining loan repayments and other expenses)

Yes, we have it all organized.

No, I don't know how I'd cope.

Not Sure

23. How much do you think you will need each month in retirement

Less than Kshs.30,000

Kshs.30,001 - Kshs.60,000

More than Kshs.60,000

24. Would it help you to have a financial roadmap to follow? Yes No

25. Do you have a written will? Have you nominated a beneficiary in the will? Would they advance your wishes? Yes No Unsure

26. Do you Know how what you own would be distributed if you died? Yes No Unsure

f) Other Comments

If there is any other information you would like to provide please do so below:

Congratulations! You have taken the first steps in assessing your financial fitness.