THE GUINAN
FINANCIAL STRATEGIES GROUP
*of Wells Fargo Advisors*

## A New Chapter, Created by You

Your divorce may have changed your life, but it did not diminish your future. With clarity, structure, and support, you can build a financial life that reflects who you are *now* and who you want to become.

Your wealth is not just a collection of assets. *It's your freedom. Your choice. Your power.*

### Client Financial Knowledge Self-Assessment

**Purpose:** To understand your starting point so we can tailor to your comfort level and needs. No right or wrong answers. Choose what feels most accurate.

**1. How confident do you feel managing your day-to-day finances?**

☐ Very confident
☐ Somewhat confident
☐ Not very confident
☐ Not confident at all

**2. How familiar are you with your current financial accounts (banking, investment, retirement)?**

☐ Very familiar
☐ Somewhat familiar
☐ Heard of them, not sure what they mean
☐ Not familiar at all

**3. When you receive financial statements (bank, credit card, investment) how comfortable are you with reading them?**

☐ Very comfortable
☐ Somewhat comfortable
☐ I can read them but not fully understand
☐ Not comfortable at all

**4. Before your divorce, how involved were you in financial decision-making?**

☐ Very involved
☐ Somewhat involved
☐ Rarely involved
☐ Not involved at all

**5. Which financial topics feel most confusing right now? (check all that apply)**

☐ Budgeting and cash flow
☐ Understanding account types
☐ Debt and credit
☐ Investments
☐ Insurance
☐ Retirement planning
☐ Taxes
☐ Other: ________________

**6. Which areas would you like to feel more confident about first?**

☐ Managing monthly expenses
☐ Understanding accounts
☐ Planning for the future
☐ Making financial decisions independently
☐ All of the above

**7. What is your preferred learning style?**

☐ Visual (charts, diagrams, simple summaries)
☐ Verbal (conversation and explanations)
☐ Hands-on (doing tasks together)
☐ Written guides and checklists

**8. How comfortable are you with online banking or financial apps?**

☐ Very comfortable
☐ Somewhat comfortable
☐ Not very comfortable
☐ Not comfortable at all

**9. What would make you feel most supported as you build financial independence?**

Click or tap here to enter text.

**10. Is there anything you feel nervous or unsure about as we begin this process?**

Click or tap here to enter text.

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