

Your Expansion Passport™

Name: _____

Date: _____

Your Expansion Passport™ focuses on increasing resources in all different areas of life. Please read the criteria to the right of each mindset and (1) write in the box labeled "Your Score Now" the number that best represents where you are now and (2) write in the box labeled "Your Goal Score" the number that best represents where you WANT to be.

	1	2	3	4	5	6	7	8	9	10	11	12	Your Score Now	Your Goal Score
1 Readiness Mindset	You haven't been able to establish an adequate emergency fund for unexpected expenses.			You have an emergency fund that would cover one month or less of living expenses.			You have an emergency fund that would cover 1-3 months of living expenses.			You have an emergency fund that would cover at least 3-6 months of living expenses.			<input type="text"/>	<input type="text"/>
2 Foundation Mindset	You haven't been able to get any of these four key protections in place (Life, Long-Term Care or Disability Insurance; Emergency Fund; Wills/Trusts).			You have 1-2 of these five key protections in place.			You have 2-3 of these five key protections in place.			You have all four of these key protections in place.			<input type="text"/>	<input type="text"/>
3 Resource Mindset	You don't use a cash flow tracker at all to see where your money goes.			You occasionally use a cash flow tracker to see where your money goes.			You frequently use a cash flow tracker to see where your money goes.			You use a cash flow tracker at least once a month to see where your money goes, as part of your overall plan,			<input type="text"/>	<input type="text"/>
4 Wellness Mindset	You really don't find much time to focus on healthy habits, such as exercising or watching what you eat.			You focus on healthy habits somewhat, but you have trouble doing so consistently.			You're doing well with healthy habits, but you also recognize that you could do better.			You focus heavily on healthy habits, with the goal of living and working energetically beyond conventional expectations.			<input type="text"/>	<input type="text"/>
5 Caring Mindset	It would be virtually impossible for your family to find and access all the documents (bank accounts, investment accounts, legal documents, etc.) they would need if you weren't around.			Your loved ones could find and access only a few of these items.			Your loved ones could find and access most of these items.			Your loved ones could find and access virtually all of these items AND you've gone over everything with a loved one.			<input type="text"/>	<input type="text"/>
6 Accumulation Mindset	You don't put money aside for important goals, such as college education for children, a down payment, or travel.			You were able to put a little aside for these goals, but then you used the fund for other things.			You occasionally put money aside for your important goals.			You put money aside regularly for your important goals, with a clear timeline for achieving them.			<input type="text"/>	<input type="text"/>
7 Walkaway™ Mindset	You do not participate in any retirement plan.			You participate only in your organization's mandatory retirement plan.			You participate in your organization's mandatory retirement plan and also contribute partially to an additional plan (457, 403b, 401k, IRA, etc).			You participate in your organization's mandatory retirement plan and you fully fund any additional plans that are available to you.			<input type="text"/>	<input type="text"/>
8 Partnership Mindset	You don't currently work with a financial advisor.			You have a financial advisor but you really manage your finances yourself.			You have a financial advisor whose advice you appreciate but you don't always feel he or she is on your side.			You have a financial advisor and because you know he or she has your best interest at heart, you work together in partnership.			<input type="text"/>	<input type="text"/>

Your Total Score Now

Your Total Goal Score

Distance from Your Goal

Your Total Goal Score – Your Total Score Now =