

Money Skills Inventory

Score / 10	Strategic Skill	Financial Implication
	Achievement or drive	Wants to get ahead (more savings)
	Adaptability	May settle for less (fewer savings)
	Analytical nature	Needs plenty of information
	Attention to detail	Able to assess contracts
	Big-picture thinking	Focuses on long-term strategies
	Communication	Understands concepts
	Competitive nature	Compares self to others
	Contextualizer	Sees where you've come from
	Decision-making	Able to set course & adjust course
	Deliberation	May avoid risk
	Discipline	Sticks to budget or financial plan
	Fairness	Desires to share wealth
	Focus	Needs clear goals / destination
	Future orientation	Likes to look ahead / dream big
	Goal orientation	Focuses on objectives
	Leadership	Likes to take charge
	Learner	Committed to self-education
	Maximizes opportunities	Strives for excellence
	Multi-tasker	Manages tasks or lacks focus
	Perfectionism	May avoid taking action
	Positivity	Sees potential & glass as half full
	Problem-solver	Strategizes to resolve challenges
	Responsibility	Takes ownership of commitments
	Self-confidence	Assured in decision-making
	Strategic thinker	Finds best route to reach goals