



How's Your Financial Confidence?

Use this quiz to help you determine which areas of your financial plan you feel confident about and which areas may need a bit more focus.

1. I feel sure that I'll know how to manage my finances in retirement (including creating an income strategy and budget) and that I'll be able to have the retirement lifestyle I desire. Yes No
2. I feel confident that I've outlined how much money I'll need to meet my retirement goals. Yes No
3. I'm certain that I'm saving enough for my retirement. Yes No
4. I know I'll have reliable sources of income during retirement. Yes No
5. I feel good about how I've diversified my portfolio. It includes the right mix of investment assets and risk. Yes No
6. I have met with my financial advisor in the last year and feel good about the guidance I received on investment and retirement decisions. Yes No
7. I feel confident that if I were to get sick during retirement, I would have enough money to cover additional health expenses. Yes No
8. I feel confident that the life insurance policy I've chosen will adequately provide for my loved ones, and I understand how life insurance can support my financial plan. Yes No
9. I believe that my estate plan – including a will, beneficiaries, and money for final expenses – reflects my current financial situation and wishes, and will leave behind my intended legacy. Yes No
10. I feel confident that I've been able to reduce taxes on my investments so I have more money to meet my needs now and in the future. Yes No

Learn how to build your financial confidence by talking with your advisor and visiting brighthousefinancial.com for tools and resources.

Hold your phone's camera over this code to link directly to the quiz online and get instant results with customized next steps.



Withdrawals of taxable amounts are subject to ordinary income tax. Withdrawals made before age 59½ may also be subject to a 10% federal income tax penalty. Distributions of taxable amounts from a non-qualified annuity may also be subject to the 3.8% Unearned Income Medicare Contribution tax that is generally imposed on interest, dividends, and annuity income if the modified adjusted gross income exceeds the applicable threshold amount. Withdrawals will reduce the death benefit and account value. Withdrawals may be subject to withdrawal charges.

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