



# Lifetime Clarity *Program*<sup>™</sup>

## SCORECARD

123 Commerce Valley Dr E  
Suite 300, Thornhill, ON L3T 7W8  
{t} 416.578.9884 {f} 416.849.0506  
toll free: 888.578.9884  
[www.lifetimeclarity.com](http://www.lifetimeclarity.com)



## Where are you on the Clarity Scale?

The first step of the process is to help you clearly understand your current situation.  
Please complete the scorecard and see where you are on the Clarity Scale.  
To find out what your score means, please return the completed exercise to  
Email: [admin@lifetimeclarity.com](mailto:admin@lifetimeclarity.com) fax: 416.849.0506

Name: \_\_\_\_\_

Gender: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Smoker / Non-smoker \_\_\_\_\_

Home Number: \_\_\_\_\_ Cell Number: \_\_\_\_\_

Address: \_\_\_\_\_

City / Province / Postal Code: \_\_\_\_\_

University: \_\_\_\_\_ Grad Year: \_\_\_\_\_

Program Specialty: \_\_\_\_\_

Date Commence Practice: \_\_\_\_\_

### Lifetime Clarity Scorecard™

To help you clearly understand your current situation, rate your reactions to each pair of phrases. Decide where you are on Clarity Scale from 1 to 10. Add up your total from each column.

I am unsure of my financial outlook.	1	2	3	4	5	6	7	8	9	10	I have a clear vision about my financial future.
I have no financial plan for my future.	1	2	3	4	5	6	7	8	9	10	I have created and implemented a clear financial plan.
I pay my expenses and spend my money without planning for it.	1	2	3	4	5	6	7	8	9	10	I have a clear budget to manage my expenses.
I only pay debt when I have money.	1	2	3	4	5	6	7	8	9	10	I have a clear strategy to pay off my debt.
I don't know about my investment options.	1	2	3	4	5	6	7	8	9	10	I am aware of the various investment strategies available to secure my future.
My family and lifetime income are not protected if I cannot work.	1	2	3	4	5	6	7	8	9	10	My family and lifetime income are protected by a well-defined insurance plan.
I don't know if I am insurable or not.	1	2	3	4	5	6	7	8	9	10	I understand that my health and lifestyle could affect my insurability.
I do not understand the details of insurance coverage.	1	2	3	4	5	6	7	8	9	10	I have a clear understanding of insurance policies and limitations.
I do not understand the difference between a private plan and an association plan.	1	2	3	4	5	6	7	8	9	10	I understand the clear difference between a private plan and an association plan.
I feel helpless when it comes to money matters.	1	2	3	4	5	6	7	8	9	10	I am confident in managing my money and finances.
ADD COLUMN TOTALS											YOUR SCORE _____