TALISMAN
Wealth Advisors

Five Questions Every Woman Should Be Able to Answer About Her Own Financial Life

Notice where you pause. The pause is information.

Read through these five questions. Rate each one honestly – not where you'd like to be, but where you actually are right now. There are no wrong answers. The pause itself tells you something worth knowing.

PART ONE · **THE FIVE QUESTIONS**

1. Could you tell someone exactly what you have and where it is?

Total assets, accounts, where they're held – without asking anyone else.

☐ *1 Clearly* ☐ *2 Sort of* ☐ *3 Not really*

2. Is there anyone whose only job is caring about your financial picture?

Not the household's, not your partner's – specifically yours.

☐ *1 Clearly* ☐ *2 Sort of* ☐ *3 Not really*

3. What would hold or break if everything changed tomorrow?

Your income, your partnership, your health – does your structure survive a real disruption?

☐ *1 Clearly* ☐ *2 Sort of* ☐ *3 Not really*

4. If you couldn't make decisions tomorrow, does anyone know what to do?

Estate documents, beneficiary designations, a person who knows – and knows where to find everything.

☐ *1 Clearly* ☐ *2 Sort of* ☐ *3 Not really*

5. When did you last actually look at what your money is doing?

Not glanced at a statement – looked. With intention. With someone who could explain it.

☐ *1 Clearly* ☐ *2 Sort of* ☐ *3 Not really*

The First Look

One conversation. We look at what's there – clearly, honestly, without judgment. You leave knowing more than you walked in with. What you do with it is entirely up to you.

- No pitch.
- No portfolio review.
- Just clarity.

Book Your First Look

"I had access. I chose not to look."

– Belle Burden, Strangers: A Memoir of Marriage · The most honest thing a woman can say about her own financial life.

PART TWO · **WHAT YOUR SCORE MEANS**

Add up your five ratings. Every number below is a starting point, not a verdict.

5-7 | CLEAR PICTURE

You know your financial picture. The structure is there – or close to it. The question worth asking now is whether it's being tended intentionally, or holding from inertia. There's a difference between a financial life that's fine and one that's working specifically for you.

8-12 | PARTIAL VISIBILITY

You can answer some of these – but not all of them, and not all with confidence. That's not a failing. It's where most high-functioning women find themselves. The financial life got parked while everything else ran in the center. The gaps are almost always manageable. They just need to be seen.

13-15 | WORTH LOOKING

You paused on most of these. That pause is exactly why this scorecard exists. It doesn't mean something is wrong – it means something has been waiting. The first look almost always surfaces something manageable that the delay made feel larger. That's usually how it goes.