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## **REGULATORY DISCLOSURE**

FEIN: 81-5201444 DUNS: 080548285 CAGE: 8CDM6 NYS Registration: 46-04-19

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(Type Name Here)

## Successful Money Management

## Pre / Post-Test

- 1. A budget is a plan for spending money. Which of the following should be practiced on an ongoing basis when establishing and updating your budget (select all that apply):
  - ] Review your budget regularly
  - ] Balance your budget
  - ] List your income
  - [ ] Track money actually spent
- 2. If you're having trouble balancing your budget, take another look at your spending. Which of the following techniques will help you balance your budget (select all that apply):

] Keep Your Spending In Line ] Assess Your Fixed Expenses ] Trim Your Variable Expenses ] Use Your Savings

3. If your unable to maintain your budget, you should trim unnecessary expenses.

[]True / []False

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4. A banks fee disclosure document will tell you the associated fees (e.g., monthly fee, per-check fee, ATM fees, etc.) and conditions for the account.

[ ] True / [ ] False

5. Balancing your checkbook regularly using a check register or online budgeting service will help you maintain your financial goals.

[]True / []False

6. You should compare and understand the terms of different credit products (e.g., credit cards, loans, etc.) before you accept one.

[]True / []False

Once completed, please return via email to:

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