



Financial Literacy Assessment

Name & Title/Role(s): _____

Co./Business: _____ Email: _____

- ❖ My company's most pressing business issue currently is:

- ❖ My company's most pressing performance management/financial issue is:

- ❖ My strongest memory of grade school math is:

- ❖ My involvement with financial statements in my business is:

- ❖ When financial conversation happens in my business, my immediate response is:

- ❖ When financial conversation happens in my business, I feel/what happens in my body is:

- ❖ What my relationship to financial information is costing me / benefiting me (circle one) is:

- ❖ What would be different if I felt more confident and in command around discussions of a financial nature is:

- ❖ What I want to know in relation to financial information is: