

Take this quick Financial Health Screening and see where you stand.

Fill in the information below and bring it by any Jefferson Bank location to set up a meeting with one of our personal bankers.

YES

NO

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Does the current way you manage your money enable you to do the things you like? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a monthly household budget? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a savings plan for financial emergencies? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have any type of overdraft protection on your personal checking account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you know your credit score? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have credit card debt, personal loans or lines of credit? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you own a home? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you own your home, have you ever considered the possibility of refinancing? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a car loan? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a personal banker? |

- Yes**, I'd like to set-up an appointment with a personal banker at Jefferson Bank to discuss setting new personal goals to improve my financial health.

Name _____

Phone _____ Email _____

Preferred Jefferson Bank location to meet _____

JeffersonBank.com

MEMBER
FDIC



NMLS ID 597833

Jefferson Bank