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# Moving Forward with Confidence: Two Resources to Assess Your Financial Readiness

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Life transitions can bring uncertainty, especially when financial responsibilities suddenly feel more immediate or unfamiliar. Whether you are navigating the loss of a spouse, becoming more involved in financial decisions, or simply looking to better understand your financial life, taking the first step toward clarity can make a meaningful difference.

We believe financial confidence starts with understanding. Through our Bridge the Gaps program, our goal is to provide thoughtful guidance, practical tools, and ongoing support to help navigate important financial decisions with clarity and confidence.

As we conclude the first of our focus areas within this program, the Confidence Gap, we wanted to provide actionable and practical resources to help in your own pursuit of financial confidence. We have created two guides to help you organize your thoughts, identify important considerations, and feel more confident asking the questions that matter most. It is not about having all the answers right away, it is about building a clearer understanding of where you are today and where you want to go moving forward.

The first resource is our "Moving Forward with Confidence" Guide, where we have bundled a series of questions across seven key areas that can help you understand and take control of your financial life. There are no right answers to these questions, nor should you feel like you need to be able to answer all of them immediately. More so, consider these an ongoing guide to help compile a more detailed and complete picture of your financial life.

The second resource is our Financial Readiness Scorecard, designed with fillable fields for you to either fill out digitally or print out depending on your preference. For this, simply check each statement (across five key areas) that accurately describes your level of financial preparedness and total the number for an overall score. Based on the score, you may find that it makes sense to explore additional resources to boost your overall financial readiness and confidence.

In tandem, these resources can hopefully function as a subtle prompt to help provide clarity and a path forward for better understanding and exploring your own level of financial confidence. As always, we encourage you to reach out to us with any questions you may have.

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For the entire current library of Bridge the Gaps content, visit our Bridge the Gaps landing page, and stay tuned in the coming weeks for our next topic: The Caregiving Gap.

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