



Self-Retreat Fee Intake Form

Please answer the following questions to the best of your ability & then count the amount of “yes’s” & “no’s” you answered. This is meant to be a guide, not a prescription:. You know your financial reality better than any person or any scale. This can be an opportunity to examine your resources (or lack thereof).

- ➡ Are you and your family homeowners or landowners? (This question does not apply to those who are Native or Indigenous)
- ➡ Did you experience early life abundance and are now only experiencing “temporary scarcity”?
- ➡ Are you able-bodied?
- ➡ Do you have a degree that you did not pay with loans (private and federal)?
- ➡ Are you able to make payments on bills or credit cards?
- ➡ Are more than half your bills on auto-pay?
- ➡ Do you experience housing security or stability?
- ➡ Do you work part time by choice? Do you work for less pay by choice?
- ➡ Do you experience ease when paying bills?
- ➡ Do you have a relatively high degree of earning power due to your level of or kind of education (or gender and racial privilege, class background, etc...)? Even if you are not currently exercising your earning power, I ask you to recognize this as a choice.
- ➡ Do you have access to residual, gifted, supplemental, or passive income?
- ➡ Have you been able to easily access and afford health insurance for yourself?

- ➡ Do you have income generating assets (real estate, investments, stocks)?
- ➡ Do you have zero to no debt? Are you able to financially manage your debt?
- ➡ Do you have a safety net composed of “financially stable” or wealthy family and friends? Do you have access to a network of wealth?
- ➡ Do you have U.S. Citizenship?
- ➡ Do you have the ability to choose to work or not?
- ➡ Does your income only support you, and not other loved ones?
- ➡ Have you or do you expect to inherit money or property?
- ➡ Have you (or could you have) attended college and/or graduate school? Have you attended private education institutions or do you have an advanced degree?
- ➡ Do you have income that is not from disability or social security?
- ➡ Do you have access to income that allows you to (regularly) vacation and spend money on other personal wants/desires?

All Yes's ➤ Full Redistribution

Mostly Yes's ➤ Moderate Redistribution

Equal Yes's and No's ➤ Full

Mostly No's ➤ Accessible