

YOUR FINANCIAL HEALTH

Periodically assess your financial health - what you focus on grows

Who do you rely on for: estate planning, tax planning, financial planning/advice, insurance, realtor, attorney, coach, spiritual direction, banking, trusted advisor?

List your debts in order of smallest to largest, with interest rate, current balance, minimum monthly payment and payoff date (estimated).

If you (and/or your significant other) lost your job or couldn't work, how would you meet your current financial obligations?

What do you currently do to manage your finances (monthly budget, expense and income tracking, set monthly/annual/long-term financial goals, etc.)?

How much did you earn in interest or dividends last year? How much did you pay in interest last year?

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What was the last financial goal you set? Did you achieve it? What financial goal are you currently working on?

When was the last time you: requested insurance quote? updated your will? checked your credit reports? updated your investment strategy?

List your savings and investments in order of largest to smallest, with interest rate or average return, current balance, automatic monthly investment amount

Who manages your finances? How often do you meet with someone else to discuss your finances (spouse, cpa/financial planner, accountability partner)?

CREATE AN UNINTENTIONAL MODEL ON YOUR CURRENT FINANCIAL HEALTH
CREATE AN INTENTIONAL MODEL ON WHAT YOUR FINANCIAL HEALTH IS BECOMING