

Take Charge of Your Financial Future!

Only you know what you need and what matters most to you. Sometimes we think we have everything under control, sometime we choose not to think about it.

For each statement, place one checkmark in appropriate column.

I am on Track With	Area of Focus	Could be better....
	All my key financial documents are organized and accessible	
	I am able to sleep at night because I have my financial situation under control	
	My significant other and I are able to speak about money/investing in a smooth and respectful manner	
	I have a monthly budget that I stick with	
	My money personality sometimes affects my ability to make proper financial decisions	
	If something happens to me, I know my family will be financially secure	
	I understand the details of my insurance policy and I am protected from risks	
	I have a financial plan that is updated regularly, and is now being executed.	
	I have strategies in place to protect my assets	
	I have strategies in place to pay the least amount of tax	
	I know what I need to save to retire on track & on schedule.	
	I have full control of my financial independence	
	I have an advisor that understands my personal situation and takes time to review & explain the different options available to me	
	I have a plan to manage should any major or “financially changing” life event occur.	
	I am confident that these steps are in place, and I’m not just assuming all will work out.	

Let’s identify what critical areas are on track and where we can do better.

Your answers should help define your next steps to financial independence.

Now take that next step!

Name: _____

