



## Your Financial Annual Checklist

In the same way we schedule an annual checkup with the doctor, take our car for an annual tune up, or evaluate our annual BMI (body mass index), it is important to align our goals with our finances for the maximum result. This checklist is meant to help you achieve that goal.

In the boxes below, please rate the percentage achieved in each category regarding your financial well-being. Once you have filled it out, share it for a chance to win one of our award-winning books.

<b>What percentage did you achieved the following financial wellbeing areas?</b>	
1. Attained the financial goals I set this year.	25%---50%---75%---100%
2. Followed an actual vs target cash flow.	25%---50%---75%---100%
3. Updated the family financial statement that reflects titles and beneficiaries.	25%---50%---75%---100%
4. Reduced debt servicing amount.	25%---50%---75%---100%
5. Saved a percentage of all my inflows.	25%---50%---75%---100%
6. Felt secure about my asset protection strategy.	25%---50%---75%---100%
7. Reflected 3 to 6 months of fixed expenses in my emergency fund.	25%---50%---75%---100%
8. Matched my estate plan to my current objectives.	25%---50%---75%---100%
9. Maximized on my tax strategy.	25%---50%---75%---100%
10. Understood my investment allocation strategy.	25%---50%---75%---100%
Average Score	

Your name Profession Contact Email Financial Goal	
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