

Your Financial Coaching Worksheet

Phase 1 – Mental Habits of Wealth

- I'm ready to think like an entrepreneur
- Review/Update your Net Worth Statement
<http://bit.ly/my-net-worth-statement> or <http://bit.ly/my-net-worth-statement-pdf>
- Review/Update your current spending plan/budget
<http://bit.ly/my-monthly-budget> or <http://bit.ly/my-monthly-budget-pdf>
- Other: _____

Notes: _____

Phase 2 – Physical Habits of Wealth

- Review current interest rate scenarios and terms on all current debts (home, auto, credit cards, etc.)
- Review and analyze all debt consolidation and monthly cash flow improvement options
- Review/Update your organization strategy for maintaining important tax documents
- Review/Update your overall tax strategy to maximize your tax savings
- Review credit report and check for accuracy and begin credit score repair process (if applicable)
- Other: _____

Notes: _____

Phase 3 – Financial Habits of Wealth

- Set up an Emergency Fund (1 to 6 month's Savings)
- Create a Debt Reduction Plan and set a date to become Debt Free
- Review/Update insurance coverage and premiums (home, auto, life, health, disability, umbrella, etc.)
- Review/Update (or Create) your personal Will or Living Trust
- Create Financial Plan and set a date to become Financially Free (income from assets exceeds liabilities)
- Review and implement advanced financial planning and investing strategies and principles
- Other: _____

Notes: _____

Phase 4 – Entrepreneurial Habits of Wealth

- Explore opportunities for advancement or income growth within current career
- Explore additional work from home opportunities
- Explore part-time job opportunities
- Other: _____
- Other: _____

Notes: _____
