Mastery Made Simple

Focus on Managing My <u>$ Health</u>

☐ 1 I am confident in my financial planning.
☐ 2 I'm working on organizing my finances.
☐ 3 I'm money stressed.

How did you do? ***20***______________________________*40*______________________________*60* *20 = Bravo!* *60 = Things to fix*	Yes 1	+/- 2	No 3
1. I can tell you my approximate debts and assets within 60 seconds.			
2. I have enough income. (obligations + savings)			
3. I feel comfortable about my financial future.			
4. My bills are paid on time.			
5. I continually learn about financial topics.			
6. A trusted person can find my essential information for me.			
7. I understand how 'file' financial information electronically if needed.			
8. I'm comfortable with how I receive statements (digital or paper)			
9. I pay my credit cards in full regularly.			
10. I can access or carry cash.			
11. I know what my financial obligations are annually.			
12. I can tell you approximately what I spend in different areas.			
13. I know what my credit card balances are.			
14. My accountant does not have to hound me for tax information.			
15. I know what and how long to save financial support documents.			
16. I have and understand my investments.			
17. My legal paperwork is current. (Will, Powers of Attorney, Living Will)			
18. I know my credit score.			
19. I have a list of regular payments and avoid missing payments.			
20. My archival document storage is updated, safe, and dry.			

How often do I review my whole financial picture? Too much or not enough?

How accurate is my financial planning (weekly, annually, long term)?

What's my fear/concern about my financial picture?

Who is my trusted person that knows where my information is stored and what to do if I'm not available?

What has this exercise brought up for me?

What's next? Visit www.MasteryConsulting.net to be my best self.