



My Financial Action Plan

NAME _____ Date _____

FINANCIAL REPORT CARD

SUBJECT	OBJECTIVE	GRADE
INCOME	At the end of each month, I earn more money than I spend. Yes <input type="checkbox"/> No <input type="checkbox"/>	
SAVINGS	If I lost my job tomorrow I have enough emergency savings to pay my bills for at least three months. Yes <input type="checkbox"/> No <input type="checkbox"/>	
CREDIT	My credit report lists three active trade lines with at a 12 month clean payment history. Yes <input type="checkbox"/> No <input type="checkbox"/>	
INSURANCE	I have enough insurance to manage my financial risks (i.e. auto, home, health, life, disability, etc.). Yes <input type="checkbox"/> No <input type="checkbox"/>	
INVESTMENTS	I am on track to have at least five times my annual income in retirement savings by age 55 and eight times my annual income when I retire. Yes <input type="checkbox"/> No <input type="checkbox"/>	

FINANCIAL GOAL #1

I WANT TO:

MY TIMEFRAME IS:

IN ORDER TO MAKE THIS HAPPEN I MUST:

SINCE MY LAST APPOINTMENT I HAVE MADE THE FOLLOWING PROGRESS:

HOMEWORK FOR NEXT APPOINTMENT:

FINANCIAL GOAL #2

I WANT TO:

MY TIMEFRAME IS:

IN ORDER TO MAKE THIS HAPPEN I MUST:

SINCE MY LAST APPOINTMENT I HAVE MADE THE FOLLOWING PROGRESS:

HOMEWORK FOR NEXT APPOINTMENT:

FINANCIAL GOAL #3

I WANT TO:

MY TIMEFRAME IS:

IN ORDER TO MAKE THIS HAPPEN I MUST:

SINCE MY LAST APPOINTMENT I HAVE MADE THE FOLLOWING PROGRESS:

HOMEWORK FOR NEXT APPOINTMENT: