

Q1

PERSONAL FINANCE REVIEW

The beginning of the year is a great time to

ORGANIZE

- Clear off the clutter from your workspace
- Organize your files so you know exactly where everything is
- Make it an area you WANT to come back to

1

REFLECT

Reflect on your achievements from the previous year

2

SET GOALS

- Work backwards with Q4 financial objective in mind
- Identify and document smaller realistic goals to tackle each quarter, month, and week to achieve end of year goals

3

CHECK SCORE

- Check Credit Score
- Address any issues to bring the score up

4

CREATE THE PLAN

- Take inventory of your fixed and variable expenses
- Add additional income streams that will aid in achieving your end of year and long term goals
- Create the monthly and annual intentional spending plan with estimates

5

PAY TAXES

Pay your taxes this quarter!

6

EXECUTE

- Update actual expenses monthly
- Execute according to the Intentional Spending Plan
- Revise as needed to stay on track

7

REBOOT

TAKING YOUR CAREER & FINANCES
TO NEW HEIGHTS

My Career