



WHERE ARE YOU TODAY?

This worksheet will help you to quickly evaluate your finances, prepare for the future, and challenge you to make a plan. The most important step, however, comes *after* making your plan—you must put it into action. Consider the plan to be like a map—without it, you can't get where you want to go!

Cash Reserves (Plan on having an emergency fund in case of emergencies. What amount is suitable for your situation?)

Where are you today?	Where do you want to be?
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Action:

Growth Strategy (Have a plan to proactively increase your savings and investment accounts.)

Where are you today?	Where do you want to be?
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Action:

Debt Elimination Strategy (Be proactive in eliminating the debt and interest that is taking away from your growth strategies.)

Where are you today?

Where do you want to be?

Action:

Risk Management/Insurance (Are you adequately insured in the areas of health, life, liability, disability, long-term care & other insurance?)

Where are you today?

Where do you want to be?

Action: