



Worksheet

4 Financial Questions You Should Be Asking (and Know the Answer to)

This worksheet is designed to help you achieve your financial goals, regardless of your age or where you are in your life. While not a comprehensive list, it can help you get started, organize your thoughts, and plan your next steps.

Question 1: What are my most important goals? (answer on the next page)

What is truly important to me, in the **short term** and the **long term**?

How do I **visualize** it, in detail?

Do I also have **value-based goals** (e.g., personal growth, helping others, or making a positive impact)?

Question 2: Am I on track to save for my most important goals?

What will each of my **goals cost**?

Make your best dollar-value projection along with each goal on the next page.

How much do I have **saved now** to reach my goals?

\$ _____

How much can I **save each month** to add to my savings?

\$ _____



Goal: _____
Cost: \$ _____
Visualization: _____

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Cost: \$ _____
Visualization: _____

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Visualization: _____

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Cost: \$ _____
Visualization: _____

Goal: _____
Cost: \$ _____
Visualization: _____



Question 3: Am I or my family prepared if there's an unexpected crisis?

Do I have a **rainy day fund** set aside? _____

A common rule of thumb is that it should be enough to cover 3-6 months of expenses, but you should find the amount that's right for you.

What kind of **insurance coverage** should I consider to protect myself or my family?

Do I have an **estate plan** in place, including a medical directive? _____

If so, when is the last time I updated it? _____

Question 4: Do I have a sound investment strategy?

Am I investing with my **goals** in mind, in terms of how much they will cost and how much time I have? _____

Am I comfortable with the **risk** I'm taking, through the ups and downs of the market?

Are there **issues that are important** to me (e.g., the environment, human rights, etc.) that I want to have reflected in my investments? _____

If I have **multiple accounts**, are they all working together towards the same strategy, or are they working against each other? _____

Do I have a way of **measuring** how well my investments are doing, regularly and consistently over time? _____
