Better Financials Health

Financial Health Checklist

Eight areas, about 15 minutes. Repeat every three months.

Mark one answer per quarter: Yes, Partly or Not yet. Use your statements to check your answers.

Area	Question	Q1	Q2	Q3	Q4
Spend	Do I spend less than I bring in?				
Spend	Did I pay every bill on time in the last three months?				
Save	Could my savings cover ___ months of essentials?				
Save	Am I saving regularly for the long term?				
Borrow	Can I make every required payment without new borrowing?				
Borrow	Have I checked my credit reports in the last 12 months?				
Plan	Have I reviewed my insurance and deductibles this year?				
Plan	Do I have one written money goal with a date?				

This quarter’s one next step: _____ Check again on: _____

Inspired by the Financial Health Network’s eight indicators. This is a self-review and provides no score.