



Grow With Joe, LLC
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About this Worksheet

This worksheet is designed to help you understand the basics of improving your personal finances.

Knowing Your Money Motives

What was your relationship with money as a kid?

What would you do if money wasn't an issue?

Who would you be if money wasn't an issue?

What would you have if money wasn't an issue?

If you only had a finite amount of time, what would you do?

If you only had 24 hours. What would you regret not doing?

When would you like to retire and how much money a month would you like to have?

Cash Flow

Create Your Budget

What percent of your income is going towards investing or savings?

What percent of your income is going towards debt?

Financial Plan

Do you have a financial plan?

How does having a financial plan benefit you?

What is your company's 401(k) match?

How much money is in your emergency fund?

Are you holding on to more than six months worth of cash?

Do you have any concerns about investing?

When are you going to review your financial plan?
