

# Financial Self Reflection

Fill out this self-reflection sheet to quickly visualize your financial goals and areas you may not understand. Then make a plan with your financial advisor so you can hit your goals.

## Pick a topic

Budgeting

Paying off Debt

Emergency Funds

Insurance

Investing

Retirement Planning

Financial Protection

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## What I Understand

## Questions I Can Ask

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Goals I Want to Accomplish

- ★ \_\_\_\_\_
- ★ \_\_\_\_\_
- ★ \_\_\_\_\_
- ★ \_\_\_\_\_

## My Plan