

Mindful Millionaire Planning System

Scorecard For Rating Your Financial House

Date: _____

Evaluate your financial house in 10 Key Areas of Focus:

Take some nice deep breaths and get hydrated before you dive in!

Review the 10 areas as noted below and rate your performance on a scale of 1-10 (1 being low performance and 10 being high performance)

10 Key Areas of Focus	Rate on Scale of 1 (low) - 10 (high)
Goal and Vision Planning -You know what you want for your financial future -You know your existing net worth and have targets for coming 1 year, 3 years and possibly 5 year. -You have a daily/monthly/yearly plan in place to bring your goals into reality	
Income Management -Steady stream of consistent income in place to meet existing obligations and have a plan in place for reaching income goals.	
Debt Management (Rate a 10 if NO debt) -Process in place to ensure schedule for short-term debt payoff and estimated timeline for paying off long-term debt like mortgages, RVs, investment properties.	

<p>Income and Expense Management</p> <ul style="list-style-type: none"> -Tracking system in place to manage income and expenses (budget/spending place/ spreadsheet) 	
<p>Pricing, Profit and Pay</p> <ul style="list-style-type: none"> -Process in place to ensure pricing, profit and pay is in alignment with financial needs and value being created (or plan for how to increase pricing/pay in the future) -A process for seeing two and three layers beyond what you charge -- noticing the growth, change, struggles and successes. 	
<p>SWOT Analysis Completed Annually for Your Managing Overall Financial House</p> <ul style="list-style-type: none"> -Strengths -Weaknesses -Opportunities -Threats -Other financial review including: Estate Planning/Wills/Trusts/Living Will Updates 	
<p>Financial Advisor Management</p> <ul style="list-style-type: none"> -Process in place to check in with advisors -questions to ask during your review with advisors -know if and when you need to find a new advisor 	

<p>Investment Management</p> <ul style="list-style-type: none"> -Process in place for understanding investing for retirement and what your future income needs will be. -Process in place for understanding and engaging in stock market investing -Process in place for understanding and engaging in passive income investing -Process in place for ensuring your values (e.g. personal, ethical, social responsibility/ impact, environmental values) are reflected in the investments you select. 	
<p>Intuition</p> <ul style="list-style-type: none"> -Process in place to check in with intuition when it comes to financial planning. -Process of knowing when to let go and trust when it feels like you're pushing too much/ trying to make things happen versus allowing things to unfold at their own pace. 	
<p>Professional Advisors/Board of Directors</p> <p>You have a group of advisors available to you including (some possible options):</p> <ul style="list-style-type: none"> -Bookkeeper/CPA -Insurance agent -Financial Advisor -Money Coach -Life/Health/Spiritual Coach -Colleagues/Mentors 	
<p>Total Score 0-100</p>	

To continue developing your financial plan for 2021, consider joining Leisa Peterson and like-minded and empathic folks for the January Virtual Retreat, go to: <https://wealthclinic.lpages.co/mindful-millionaire-retreat>