

Worksheet 12

My Annual Money Review

Once a year, sit down and answer these honestly. The principles do not change, but your answers will.

Did I hit my savings and investing goals this year? _____

Why or why not? _____

Has my income changed? Have I increased what I pay myself to match? _____

Is my emergency fund still the right size for my life today? _____

Are my goals still the right goals — or do they need updating? _____

Any new debt? What is my plan to clear it? _____

Is my money still automated and quietly working without me? _____

What is my single most important money goal for the year ahead? _____