



The 7 Minute Financial Peace Checklist

Check All That Apply

1. Cash Flow

- ☐ I know exactly how much money comes in each month.
- ☐ I know exactly how much money goes out each month.
- ☐ I have a positive monthly cash flow.
- ☐ I follow a monthly budget.

3. Emergency Savings

- ☐ I have an emergency fund.
- ☐ I could cover 3-6 months of expenses.
- ☐ I do not rely on credit cards during emergencies.

5. Retirement Planning

- ☐ I know how much income I need in retirement.
- ☐ I have reviewed my retirement accounts recently.
- ☐ I have a retirement income strategy.

2. Debt

- ☐ I know my total debt amount.
- ☐ I know my interest rates
- ☐ I have a debt elimination plan.
- ☐ I am reducing debt each month

4. Protection

- ☐ I understand my health insurance or Medicare coverage.
- ☐ My family has adequate life insurance protection.
- ☐ I have reviewed my coverage in the last 12 months.

6. Estate And Legacy Planning

- ☐ My beneficiaries are up to date.
- ☐ I have a trust or will.
- ☐ My important documents are organized.

Your Score: Checks

18-20 Checks: You're on the path to financial independence.

12-17 Checks: Good progress, but there may be areas needing attention.

0-11 Checks: Significant opportunities exist to improve your financial future.