



Becoming Bleau

CONFIDENT · PROTECTED · PREPARED

FREE FAMILY RESOURCE

The Family Financial Check-Up

Protect What You Have. Prepare for What's Next. Build a Legacy That Lasts.

Welcome

This check-up helps you see where your family stands today, spot gaps in protection, and choose practical next steps toward a more secure future. There are no right or wrong answers, only a clearer picture.

How to Use This Check-Up

- 1 Pick your way to use it**
Print it and write by hand, or fill it in on a phone or computer by tapping the boxes and typing in the fields.
- 2 Be honest, and kind to yourself**
Check a box only when the statement is fully true for your household today. Every unchecked box is simply a next step.
- 3 Work through pages 2 to 4**
Financial Snapshot, Protecting Your Family, and Building Stability & Wealth. Take them in order, or start with the one that matters most.
- 4 Add up your score**
On page 5, scores total automatically in most computer PDF viewers. On a phone or on paper, just count your checks.
- 5 Choose three action steps**
Write one thing to do this week, one within 30 days, and one within 90 days. Small steps count.

GOOD TO KNOW

Some phone viewers do not keep what you type, so save or print your finished copy. This check-up is for education and self-reflection and is not financial, legal, or tax advice.

Your Family Financial Snapshot

Theme: Know Where You Stand

“Financial confidence doesn’t start with having a lot of money. It starts with knowing what you have, what you owe, and what matters most.”

- ☐ I know my household’s monthly take-home income.
- ☐ I have a written monthly spending plan.
- ☐ I know my total debt balances and monthly payments.
- ☐ I regularly review my financial accounts.
- ☐ I know my approximate net worth.
- ☐ I have identified my family’s top three financial goals.

Mini Worksheet

MONTHLY TAKE-HOME INCOME

\$

MONTHLY EXPENSES

\$

TOTAL DEBT

\$

SAVINGS

\$

MY TOP FINANCIAL PRIORITY RIGHT NOW

Protecting Your Family

Theme: *Protect What Matters Most*

- ☐ I have reviewed my life insurance needs.
- ☐ I have reviewed my health, auto, and home/renters insurance.
- ☐ I have a will or estate plan that reflects my wishes.
- ☐ I have considered guardianship arrangements for minor children.
- ☐ I have reviewed beneficiaries on important accounts.
- ☐ I understand whether I need financial and healthcare powers of attorney.
- ☐ I have taken steps to protect my family's identities.
- ☐ I know where my important legal and financial documents are stored.

REFLECTION PROMPT

If something unexpected happened tomorrow, what would my family have difficulty finding or handling?

Building Financial Stability & Wealth

Theme: Move From Surviving to Building

1 Emergency Readiness

- ☐ I have started an emergency fund.
- ☐ I have a plan for unexpected expenses.
- ☐ I know which debts I want to eliminate first.

2 Future Planning

- ☐ I am contributing toward retirement.
- ☐ I have explored education or future savings for my children.
- ☐ I understand the basics of investing.
- ☐ I have considered how to build assets for my family's future.

3 Growing Opportunities

- ☐ I have considered ways to increase my household income.
- ☐ I know which skills or resources I could use to create additional income.
- ☐ I have a financial goal for the next 12 months.

MY 12-MONTH FINANCIAL GOAL

Your Family Wellness Score

Theme: Awareness Creates Action

Give yourself 1 point for each statement that is fully true for your household (0–24 points).

In the fillable PDF, your scores total automatically as you check boxes. Printing? Simply count your checks.

FINANCIAL SNAPSHOT

0 / 6

FAMILY PROTECTION

0 / 8

STABILITY & WEALTH

0 / 10

YOUR FAMILY CHECK-UP SCORE

Getting Started: begin with the basics.

0 / 24

Start with the basics: understand your numbers, identify essential protections, and choose a manageable first action.

The score is a self-reflection tool, not a professional assessment of financial health or legal readiness.

My Top 3 Action Steps

1

One thing I can complete this week

2

One thing I can improve in the next 30 days

3

One thing I want to accomplish within 90 days

Your family's future deserves a plan.

“You don’t have to figure everything out alone. Whether you’re protecting your family, reviewing important documents, or learning about affordable legal and identity protection, I’m here to help you explore your next steps.”

Complimentary Family Protection Conversation

Connect with Heather Bleau | Becoming Bleau | LegalShield Independent Associate
Licensed in Life & Health Insurance (Medicare focused) | NPN 20778291

[Explore Family Protection Options](#)
bleaubiz.com


Scan to book



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Thank You

Taking the time to look at where your family stands is an act of care, and you have already begun. Whatever your score, you now have a clearer picture and three next steps to work toward.

Come back to this check-up in a few months and see how far you have come.

Know a family who could use this? Please share it with them.

Ready to talk it through?

Book a complimentary Family Protection Conversation

bleaubiz.com

With gratitude,

Heather Bleau

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