

MONTHLY






# your financial well-being

MONTHLY AGENDA

MONTH:

## FINANCIAL MOOD CHECK

What is your financial mood (in terms of financial comfort, financial accomplishments, financial stress, financial anxiety, etc)?

Tick	Financial Mood	Check-in
<input type="checkbox"/>	I am a financial badass	
<input type="checkbox"/>	I'm quite ok	
<input type="checkbox"/>	I feel sad and disappointed	
<input type="checkbox"/>	I feel angry	
<input type="checkbox"/>	I feel frustrated	

## GRATITUDE

What are you grateful for this month?

#	I am grateful for....
#1	Add items here
#2	Add items here
#3	Add items here

# ACTIONS

Question	Action	Status	
What actions did you take this month?	<ul style="list-style-type: none"> <li>● Add items here</li> <li>●</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Completed Ongoing Parked
How did these actions contribute to your financial well-being?	<ul style="list-style-type: none"> <li>● Add items here</li> <li>●</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Completed Ongoing Parked
What went well this month?	<ul style="list-style-type: none"> <li>● Add items here</li> <li>●</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Completed Ongoing Parked
What challenges or obstacles did you encounter this month? How did you overcome them?	<ul style="list-style-type: none"> <li>● Add items here</li> <li>●</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Completed Ongoing Parked
What lessons did you learn from your experiences this month?	<ul style="list-style-type: none"> <li>● Add items here</li> <li>●</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Completed Ongoing Parked
Did anyone play a role in supporting you this month? If so, who & how?	<ul style="list-style-type: none"> <li>● Add items here</li> <li>●</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Completed Ongoing Parked
Looking forward, what is your aim for the upcoming month?	<ul style="list-style-type: none"> <li>● Add items here</li> <li>●</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Completed Ongoing Parked

# WINS

Add any wins of the month no matter how little; they are important if you feel or think about them

# CONCERNS

- Add any issues or blockers
- ~~Cross them out as they get resolved~~

# SUPPORT NEEDED

Tasks or Issues	Notes
Add items here	Add relevant details

# Feedback

Questions	Answers & Suggestions
<ul style="list-style-type: none"><li>● What did you enjoy most about this month's newsletter?</li></ul>	<ul style="list-style-type: none"><li>● Add any recommendations for improvement</li></ul>
<ul style="list-style-type: none"><li>● Did you find the tips and strategies provided in the newsletter actionable and easy to implement?</li></ul>	<ul style="list-style-type: none"><li>● Add more as needed</li></ul>
<ul style="list-style-type: none"><li>● Is there anything you would like to see more of in future newsletters?</li></ul>	<ul style="list-style-type: none"><li>● Add more as needed</li></ul>

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