

Fix It Fast: 5-Minute Financial Assessment

Your Quick Check to Financial Clarity!

Grab a notebook or clean sheet of paper, and complete each section in just 5 minutes to gain clarity on your finances. Focus on the key items that matter most!

This assessment is your first step toward financial freedom. Let's uncover what's working and what needs fixing! Making sure to tackle the right problem.



Income

What are your income sources & amounts? (e.g., Salary, Hustles)



Expenses

List your top fixed and variable expense categories & amounts



Savings/ Investments

List your savings and investment amounts



Debt

List all your debt amounts and their interest rates

What Did You Discover?

What's working?

Good Income? No debt?
Controlled Spending?
Solid Savings/Investments?

What needs fixing?

More Income? Lower
Spending? More Savings?
Eliminate Debt?

Feeling stuck? Let's uncover your path to financial clarity together!
Discover personalized coaching tailored to your needs.

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