

# Wellwork for Week 5

Assess your actual financial needs.

You have created a vision for what you want to manifest. Now it's time to put numbers together with that vision. DECIDE with certainty and authority what you want and ALLOW new ideas for how to achieve your goals to present themselves.

Answer the following questions for yourself with as much detail as possible.



# Wellwork for Week 5

What are your financial goals and dreams?

- Build Retirement Wealth
- Buy a New Home
- Build Savings for Unexpected Expenses
- Reduce or Pay Off Mortgage
- Education Funding
- Alternative Income in case of disability or death
- Help Support Aging Parents
- Pay Off Credit Cards/Debts
- Start a Business



# Wellwork for Week 5

List your Income - Account for all sources of income, including salaries, wages, rental income, pensions, alimony, etc.

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# Wellwork for Week 5

List your Expenses - Having an accurate picture of cash flow is critical to designing the right solutions. Knowing the amount of discretionary income helps identify what resources are available to work with.

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# Wellwork for Week 5

List your Debt - Having an accurate picture of debt is critical to designing the right solutions.

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# Wellwork for Week 5

If you or your spouse could not work again, how much income would you need to sustain your current lifestyle? \_\_\_\_\_

What is your current balance on your home mortgage? \_\_\_\_\_

Approximate cost of Education \_\_\_\_\_

Type and Value of existing Life Insurance Policies \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_



# Wellwork for Week 5

Value of Savings \_\_\_\_\_

Value of Emergency Funds \_\_\_\_\_

Other Investments \_\_\_\_\_

Again, this information is important for you to look at, to educate yourself on what you can be doing differently, doing better and to allow for growth.

If you want to schedule a session to talk further with a financial services professional click here to book.

<https://www.crystalwillingham.com/book-online/financial-wellness-consultation>

