

Financial Reset Worksheet

A simple starting point for understanding where your money stands and deciding what to work on first.

Part 1: Current Financial Situation

Fill in the fields below with approximate amounts to understand your finances.

Category	Amount
Monthly income (after taxes)	
Essential expenses (total)	
Total debt (approx.)	
Savings / Emergency fund	

Part 2: Identifying Priorities

Check any areas that need attention, then answer the questions below.

☐ Outstanding debts

☐ Irregular income

☐ No emergency fund

☐ Impulse spending

☐ Overdue bills

☐ No clear budget

1. What is your biggest financial concern right now?

2. How do you feel when you review these numbers?

3. What do you plan to change first?

Part 3: Your Financial Reset Plan

Focus on a few realistic actions instead of trying to fix everything at once.

My 3 small wins for this month:

If I could improve only one thing about my money this month, it would be:

The first action I will take in the next 48 hours is:

One thing I will stop worrying about for now:

My next financial check-in date: _____

Name: _____	Date: _____
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