

# Financial Wellbeing Reflect and Reset Worksheet



ENGAGE - EDUCATE - EMPOWER

## Where is my money coming from?

List all your income sources (e.g., salary, side hustle, investments, rental income).  
Note the approximate monthly or annual income for each source.

## Which income streams are the most rewarding?

Highlight your highest-earning sources.

## What new possibilities am I exploring?

Note any new projects, ideas, or qualifications that could boost your earning potential.

## Why am I working?

Write about the purpose behind your efforts (e.g., supporting family, building wealth, personal fulfillment).

## What do I want to achieve with the money I make short-term (e.g. reducing debt, funding a holiday, building an emergency fund)?

## What do I want to achieve with the money I make long-term (e.g. buying a home, retiring comfortably, starting a business)

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## How do I want to earn my money?

- Reflect on the type of work that feels fulfilling or aligns with your values.
- Ask yourself: Does my current work reflect what I truly want to do?



## What makes me anxious about earning money?

- Identify your biggest money-related stressors (e.g. job instability, high expenses, uncertainty).
- Consider: What steps can I take to reduce this stress in 2025?

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## What do I truly want most?

- Free-write your deepest dreams and desires.
- Ask: What small steps can I take in 2025 to bring this vision closer to reality?

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## Identify three actionable steps you can take to improve your financial health in 2025.



## Commit to one new habit that will support your goals (e.g. creating a budget, automating savings, tracking expenses).

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