

# The Financial Clarity Checklist

By Mansoor – Global Hill Wealth

This simple checklist is designed to help you understand where you stand financially and identify areas that need more attention. Take a few minutes to reflect on each section below. It's a small step that can bring big clarity.

## 1. Your Financial Foundation

- Do you have a clear understanding of your income, expenses, and savings each month?
- Do you have an emergency fund that covers 3–6 months of living expenses?
- Are you managing debt strategically and efficiently?

## 2. Planning for the Future

- Have you set clear short-term and long-term financial goals?
- Do you have a retirement plan in place, and are you contributing regularly?
- Have you reviewed your insurance coverage for adequate protection?

## 3. Investments & Growth

- Are your investments aligned with your goals and risk tolerance?
- Do you review and rebalance your portfolio regularly?
- Are you taking advantage of tax-efficient investment strategies?

## 4. Estate & Legacy Planning

- Do you have a will or estate plan in place?
- Have you designated beneficiaries for all accounts and insurance policies?
- Do you have a plan for passing wealth or supporting charitable causes?

## 5. Next Steps

If you answered 'no' or 'not sure' to any of these questions, it might be time to talk to a professional who can help bring clarity and structure to your financial life. At Global Hill

Wealth, we help clients create personalized plans for growth, protection, and peace of mind.

■ Schedule a complimentary consultation today at:

[www.globalhillwealth.com](http://www.globalhillwealth.com)

Together, we'll turn your financial goals into a clear, confident plan.