



Pivot 2
Prosperity

PLANNING GROUP



Financial Clarity Checklist

Get Organized. Get Prepared.
Take Control of Your Financial Future.



P2PPG

Pivot 2 Prosperity Planning Group™

SCHEDULE YOUR
CALL TODAY!



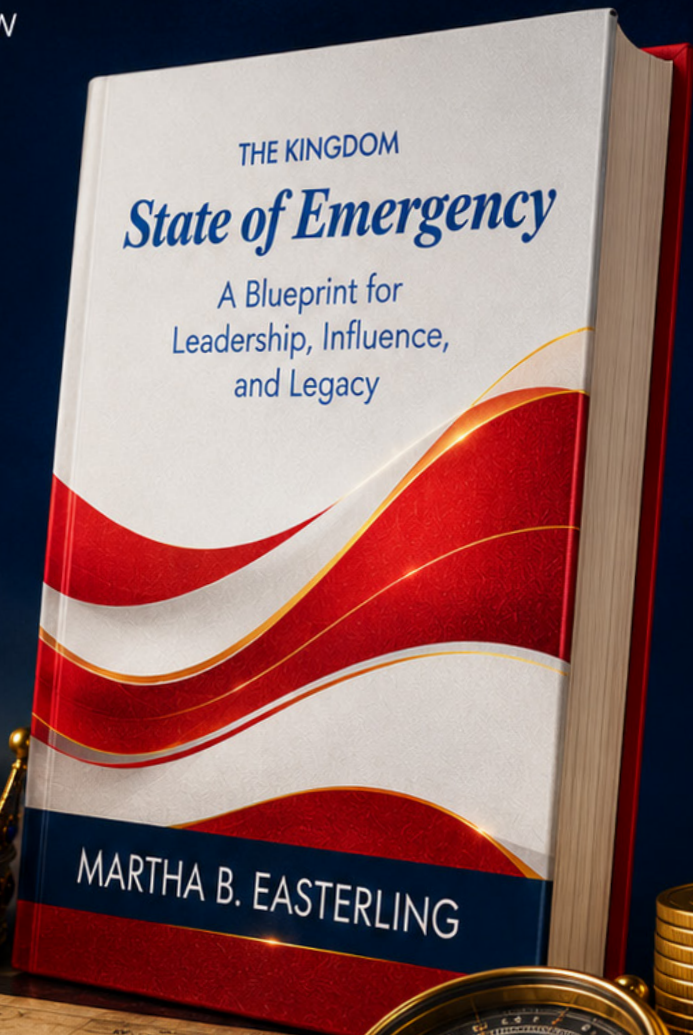


Page 1:

Introduction

Financial clarity is not about how much money you make— it's about how well your finances are **structured, organized, and prepared.**

This checklist is designed to help you identify where you currently stand and what areas need attention so you can move forward with **confidence and control.**



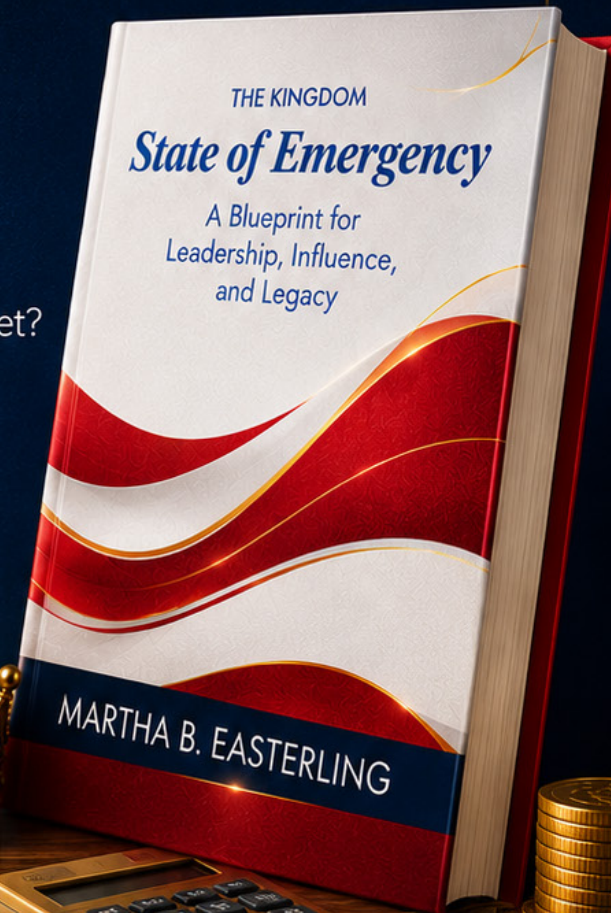
PLAN

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Personal Financial Organization

- ✓ Do you have a clear understanding of your monthly income?
- ✓ Do you know exactly where your money is going each month?
- ✓ Do you have a working monthly budget?
- ✓ Are your expenses categorized and tracked?
- ✓ Do you have visibility into your bank accounts and balances?



Personal Financial Organization

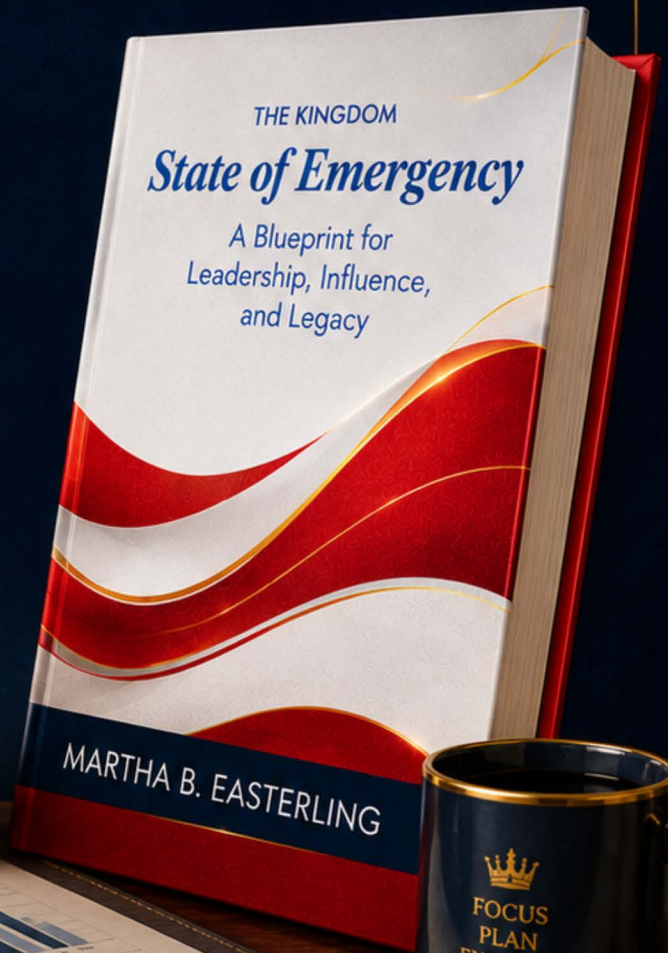


NOTES

Business Financial Structure

(If Applicable)

- ✓ Is your business financially organized?
- ✓ Do you separate personal and business finances?
- ✓ Do you have a structured budget for your business?
- ✓ Are you tracking revenue and expenses consistently?
- ✓ Do you understand your cash flow?



Business Financial Structure

(If Applicable)



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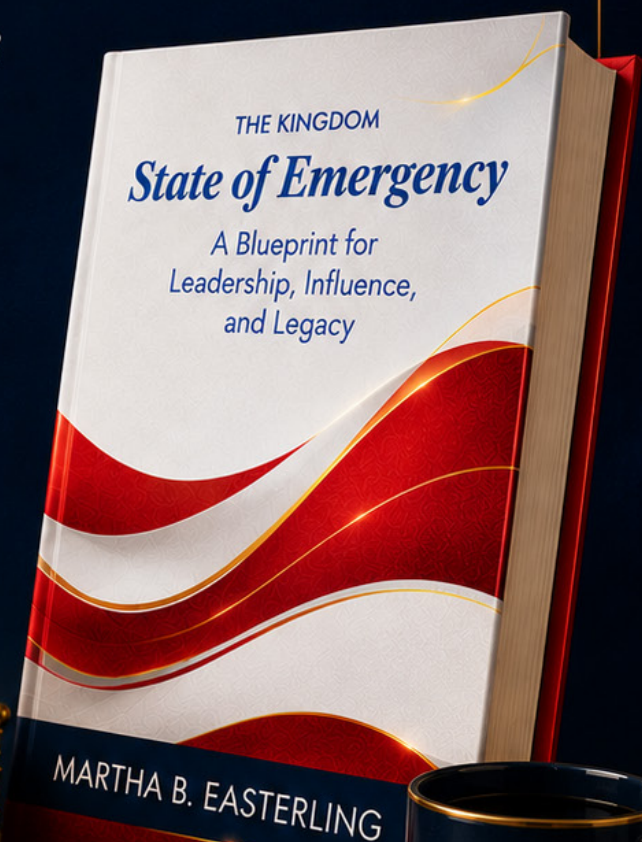


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Preparedness & Protection



- ✓ Do you have an emergency fund?
- ✓ Do you have life insurance or protection plans in place?
- ✓ Do you have a will or trust established?
- ✓ Are your important financial documents organized and accessible?
- ✓ Do your loved ones know where critical information is located?



Preparedness & Protection



NOTES



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Financial Awareness & Growth



Do you feel confident making financial decisions?



Do you have a financial plan for the next 6–12 months?



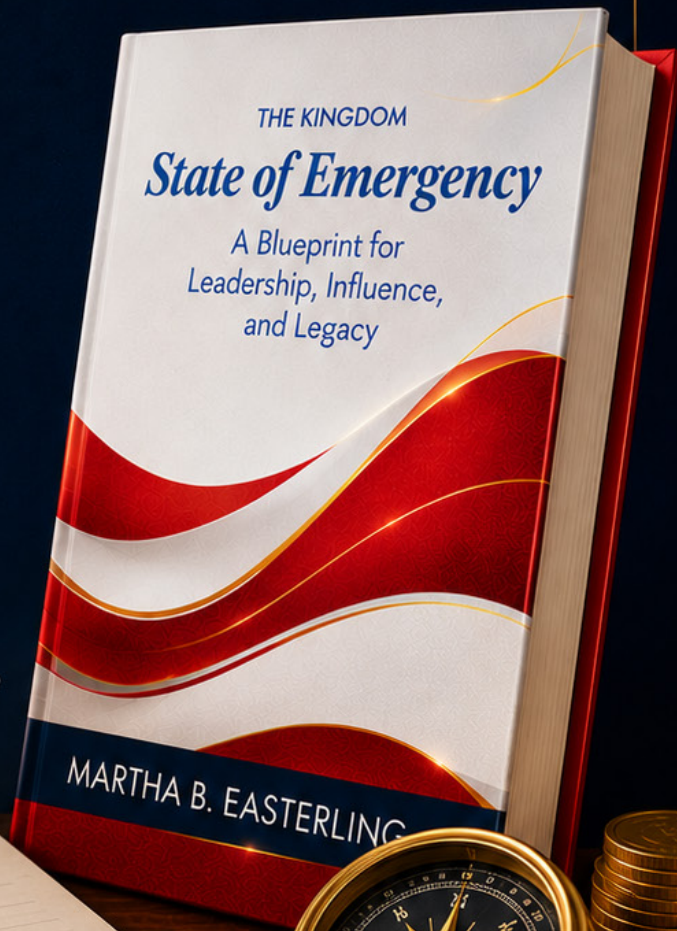
Are you actively working toward financial goals?



Do you receive guidance or professional support?



Do you have a strategy for long-term stability and growth?



Financial Awareness & Growth

NOTES



Page 6:

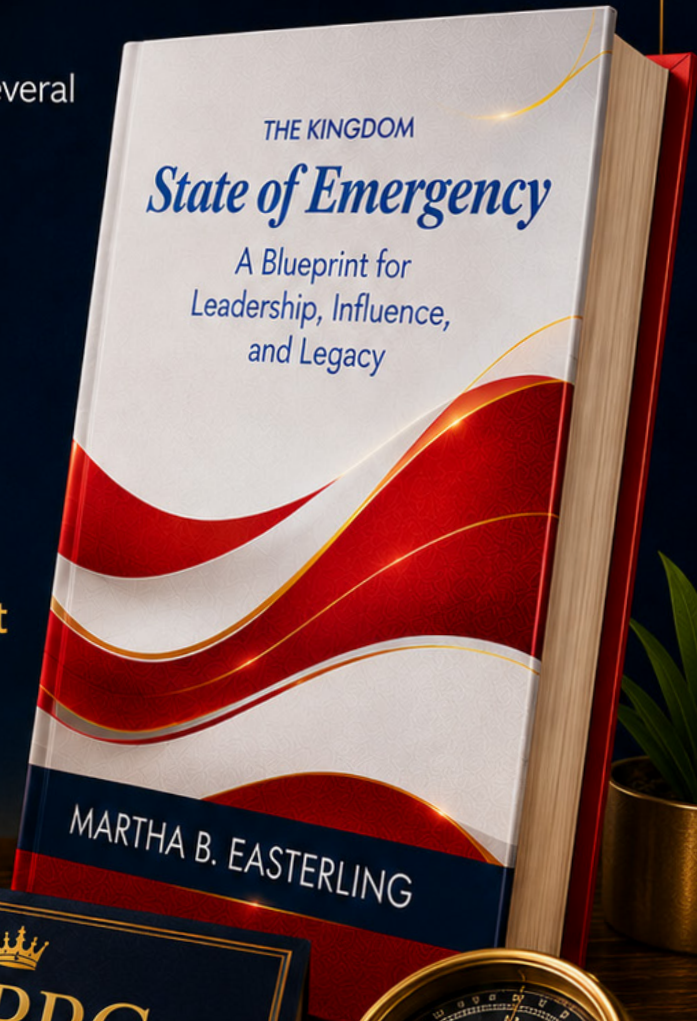
Your Next Step



If you answered “No” or “Unsure” to several of these questions, it’s not a failure—it’s a signal that **structure is needed.**



Financial clarity comes from having the right **systems, guidance, and support** in place.



Page 7:

Your Call to Action

Start with a
Free Clarity Call

WE WILL:



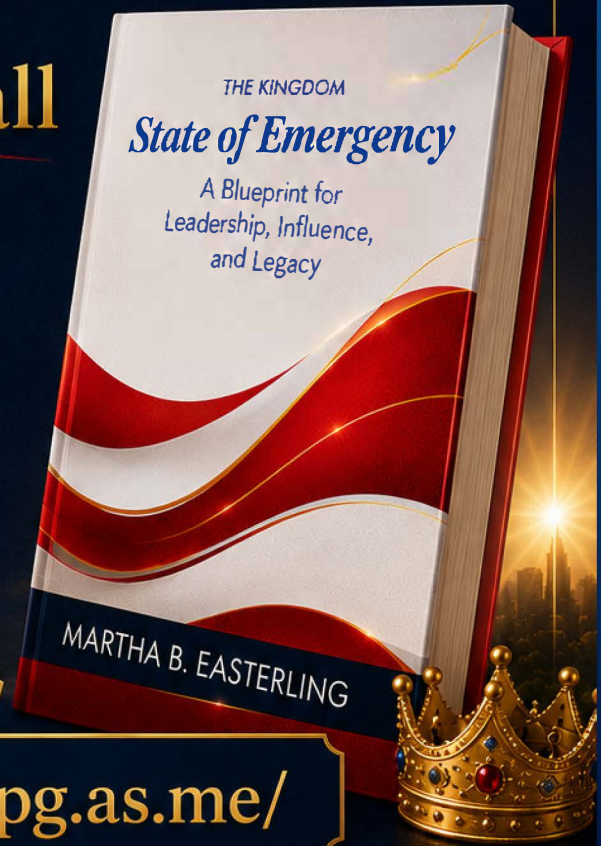
Review your current situation



Identify gaps



Provide clear next steps



BOOK NOW:



<https://p2ppg.as.me/>

OR CONTACT:



Mobile Line: (703) 269-7307 (Text & Call Friendly)



Business Phone: (919) 977-4032 (Not Text Friendly)

SCHEDULE YOUR CALL TODAY!



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