

A Fresh Start

With CoachKimE

Financial Accountability Coach – Small Business Consultant

Refocus

- ☐ Review your goals from this year
- ☐ Connect with your “why”
- ☐ Celebrate your wins
- ☐ Acknowledge challenges honestly
- ☐ Review major life decisions

Gain Control

- ☐ Calculate your net worth
- ☐ Pull your free annual credit report
- ☐ Review your identity theft protection reports
- ☐ Review all beneficiaries
 - Life insurance
 - Retirement accounts
 - Bank accounts
 - Investment accounts
- ☐ Review your insurance coverage
- ☐ Complete your open enrollment review
- ☐ Review your savings
- ☐ Review your debt
- ☐ Audit your subscriptions and memberships
- ☐ Review retirement and investment accounts
- ☐ Organize tax documents and confirm your tax plan

Set A Plan

- ☐ Set intentional goals for the new year
- ☐ Update your monthly spending plan
- ☐ Build or refresh your sinking funds
- ☐ Review and adjust your retirement contributions
- ☐ Plan for major upcoming expenses
- ☐ Update your giving plans
- ☐ Set a monthly or quarterly financial check-in rhythm
- ☐ Consider whether you need financial accountability or coaching

Bonus

Quick Wins:

- ☐ Cancel unused subscriptions
- ☐ Pull your credit report
- ☐ Calculate your net worth

Set-it-up-once Tasks:

- ☐ Update beneficiaries
- ☐ Freeze your credit
- ☐ Set up automatic transfers

Accountability Steps:

- ☐ Choose your monthly budget meeting time
- ☐ Add your quarterly review to your calendar
- ☐ Share your top 3 goals with someone who will encourage you

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 www.CoachKimE.com

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Discover a Life of Financial Freedom