

20 easy activities to improve your financial well-being

Number	Category	Activity	Notes	Done
1	Financial habits	Program 15min of "Wealth management" in your weekly calendar		
2	Financial habits	Organize your last month's spending in categories		
3	Financial habits	Commit to a new positive financial habit		
4	Financial mindset	Perform financial well-being assessment		
5	Financial mindset	Write down your financial objectives for the coming year (6 months)		
6	Financial mindset	Prepare your financial to-do list for the next month		
7	Financial mindset	Start reading a book to grow your financial confidence		
8	Financial mindset	Have one "uncomfortable" financial conversation		
9	Financial planning	Understand your pension plan provisions with your current employer		
10	Financial planning	Use financial calculator to project your wealth growth in the future 10 years		
11	Learning	Watch the webinar on investing		
12	Learning	Prepare a learning plan to grow your financial confidence		
13	Saving	Determine the percentage of your savings from last year in relation to your annual income		
14	Saving	Make a list of all your current subscriptions, see if you can eliminate any		
15	Saving	Re-negotiate one of your current contracts (utilities, telephone, bank, etc.)		
16	Saving	Automate your monthly savings		
17	Saving	Find one spending which does not fit with your values		
18	Wealth growth	Understand the management fees of your investment products		
19	Wealth growth	Assess the rate of return on your investments (pension products)		
20	Wealth growth	Think of the ways you could grow your wealth long-term		