FINANCIAL COACHING
with Sigrid

Money Clarity Check-In

A short, supportive reflection to help you gain clarity around your money and decide if financial coaching is right for you.

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1. When you think about your money right now, which best describes you?

☐ Calm and in control
☐ Mostly okay but inconsistent
☐ Stressed or overwhelmed
☐ Avoid checking altogether

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2. Which areas feel hardest right now? (Tick all that apply)

☐ Budgeting / tracking spending
☐ Managing bills
☐ Debt
☐ Saving
☐ Feeling confident with money decisions
☐ Staying consistent

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3. Do you feel clear on where your money goes each month?

☐ Yes
☐ Somewhat
☐ No

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4. What would you most like help with?

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5. If your money felt more organised and calmer, what would that change for you?

☐ Less stress
☐ Better sleep
☐ More confidence
☐ More choices
☐ Feeling in control

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6. What best describes you right now?

☐ I am just starting to think about this
☐ I know I need support but don't know where to start
☐ I am ready to take action with guidance

If this check-in highlighted questions or uncertainty, this is exactly what we work through together in a personalised financial coaching session.

You don't need to figure this out on your own.

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Disclaimer:
The information you provide in this questionnaire is confidential and used solely to prepare for your coaching session. Financial Coaching with Sigrid provides education and guidance to help you understand your money and make informed choices. All information shared is factual and general in nature and does not constitute financial advice. You should seek professional advice from a licensed Financial Adviser, Accountant, or Solicitor or other professional before making financial decisions.