

Am I Okay?

A Quiet Moment to Reflect

This is a quiet, personal space just for you—a moment to pause, breathe, and gently check in with yourself. You can print this worksheet or complete it digitally. There are no right answers—only honest ones.

Name: _____ Date: _____

Season of Life I'm In: _____

1. What does 'being okay' look like for me in this season of life?

2. Where do I feel financially peaceful right now?

3. What's keeping me up at night that I haven't said out loud?

4. What's one small step I could take toward more clarity?

5. What do I need—from my adviser, or from myself—right now?

This work I do isn't just about money. It's about walking with real people through real life.
And that includes you. Gently, steadily, I'm here.

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