

Personal Financial Analysis



Date: _____

What is my current situation? (Key areas I should consider – career, retirement goals, family, financial situation, hobbies, housing, etc.)

What are my short-term and long-term goals? (Financial and personal.)

When was the last time I reviewed my investment portfolio and retirement plan?

Action Plan

Keys to Achieving Your Goals:

My Concerns:

Next Steps:

1. _____
2. _____
3. _____
4. _____