

Holistic Financial Planning Checklist

Name: _____

Date: _____

Life Assessment - The Past

Any major past financial events/decisions and their general results.

Any major non-financial events/decisions and their general results.

Life Assessment - The Present

Summary of Life Status

What are your positive/good conditions/situations/attributes?

What are your challenging/difficult conditions/situations/attributes?

Do you have all the information needed to make decisions?

Where are you now in the decision-making/implementation process?

Do you have qualified advisors to assist you?

Health Status

How is your physical health?

How is your mental health?

Financial Status¹

What are your largest assets and the status of each?

What are your largest debts? List related issues.

What is your current and projected monthly cash flow?

What is the status of your job? List other income sources.

Relationships

What is the status of your relationship with:

Spouse/Partner _____

Siblings _____

Parents _____

Extended Family _____

Friends _____

Business Associates _____

Others _____

Life Assessment - The Future

What changes are predicted for the future?

Have goals been set and plans made to achieve them?

What is the status of implementing the goals?

¹ A current balance sheet and cash flow statement should ideally be prepared.