Client N	Name:	Enter your name here		
		Progress Checklist		
Task Number		Task	Target Date	Date Completed
1 <u>Wa</u>	atch the RFL Financi	ial Planner Tutorials - https://got2givemore.com/tutorials_sp/		
2 <u>Hav</u>	ve a question? Ask	cour coaches on our FORUM - https://got2givemore.com/community-2/		
3 Wi	rite down short	and long-term financial goals in Vision Casting section of PROGRESS CHECKLIST		
4 Tra	ack household e	expenses using an app, DAILY TRACKING, or paper/pencil		
5 Co	mplete your NE	T WORTH statement		
6 Co	mplete your IN	COME statement		
7 Cre	eate a debt elin	nination plan (MM2) using MILE MARKER GOALS		
8 De	velop a monthl	y HOUSEHOLD SPENDING PLAN		
9 Cre	eate a giving pla	an on the HOUSEHOLD SPENDING PLAN tab		
10 Tra	ack your spendi	ng against your plan. DAILY TRACKER		
11 Fu	nd Mile Marke	r 1: Cash reserve of one months' expenses in bank account in MILE MARKER GOALS		
12 Fu	nd Mile Marker	3: Life Fund of 3 – 9 months' expenses in separate bank account in MILE MARKER GOALS		
13 <u>Pul</u>	ll and review credit	report - https://www.annualcreditreport.com		
14 <u>Che</u>	eck status of Social	Security Contributions and Benefits - https://www.ssa.gov/myaccount/		
15 Re	view life insura	nce policies (if applicable)		
16 Re	solve a tax situ	ation (if applicable)		
17 De	velop a formal	estate plan (will, trust, power of attorney, health care directive)		

	VISION CASTING: Life & Financial Goals Short term = 1-5 years Intermediate term = 5-15 years Long term = over 15 years	Amount Needed	Target Completion Date	
S				
<u>₹</u>				
GOALS				
		\$ -		

	NET WORTH	
Assets - What You Own	Description / Details	Amount
Checking Account Balance(s)		
Savings Account Balance(s)		
Credit Union Balance		
Investment Account(s) (Value)		
Value of Home (Zillow estimate)		
Other Savings		
Other Savings		
Retirement Plans (401K/SEP/IRAs)		
Vehicle 1 (age/make) (Blue Book)		
Vehicle 2 (age/make) (Blue Book)		
Money Owed to Me		
	Total Assets	-
Liabilities – What You Owe Others	Name of Creditor/Lender	Balance
Debt from MILE MARKER GOALS Tab	Total number of MM2 accounts = 0	-
List Other Debt not included in MM above		

Net Worth: Assets - Liabilities =

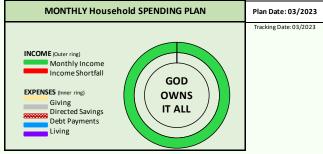
Total Liabilities

		House	hold W2 Inco	ome				
Name of Income Source:	Income Name	Income Name	Income Name	Income Name	Income Name	Income Name	Income Name	Income Name
Weekly = 52 Every Other Week = 26 Twice a Month = 24 Monthly = 12 Custom (ex: Annual = 1; Teacher = 10)								
Number of Paychecks per Year:					-			
NET take home Wages PER PAY CHECK								
Monthly NET Income (take home)	-	-	-	-	-	-	-	-
				(HOUSEHOLD SE	ENDING PLAN) T	otal NET W2 Inc	ome per Month	-
NOTE: Deductions for Employee Payroll Deductions per Paycheck purposes only. The to carry forward to the							amounts do not	
Retirement (401/403/Pension)								
ealth Savings Account (HSA)								
ependent Care Flexible Spending Account (DCFSA)								
lealth Care Flexible Spending Account (FSA)								
ealth Insurance								
ye / Dental Insurance								
ife Insurance Self								
ife Insurance Spouse								
ong Term Disability Insurance								
Inion Dues								
Profit Sharing/Stock Purchase								
iarnishments								
ate Taxes								
ederal Taxes								
ederal Taxes ocial Security Ither								

Other Income Worksheet	
This section is for money you receive every m that is not payroll or from your business. Examples include: Alimony, Child Support, Friends,	
Other Monthly Income	
Source Name	Monthly \$
<u> </u>	
	
Total Monthly Other Income	-
(HOUSEHOLD SPENDING PLAN)	

	FINANCIAL GOALS DASHBOARD MM2 Sort: Low Balance	Amount Needed	Calculated Completion Date
MILE 1	Fund your Cash Reserve Fund - 1 months' expenses in checking HINT: 1 months' expenses (Give+Live+Debt) = \$0 + 1 yr Periodic expenses = \$0 From HHSP x 12 = \$0	\$0	
MILE 2	Eliminate all consumer debt (non-mortgage)	\$0	
MILE 3	Fund your Life Fund 3 – 9 months' expenses in separate bank account. HINT: 3-9 months' expenses = \$0 - \$0 From HHSP	\$0	
MILE 4	Fund your Long Term Goals (house, college, retirement, etc.)	\$0	

	Mile N	larker Dat	a Entry			
D	PLAN Date (HH SPENDING PLAN): ebt (MM2) min monthly Payment: ial Margin (HH SPENDING PLAN): Total Monthly Payment:	3/1/23 \$0 \$0 \$0	Mile Marker 2 Total Inter Monthly Inter	est Paid: \$	alance 0 0	<- Click here to select MM2
What	Bonus Margin (PAYMENT PLAN) -if Add'l Margin (PAYMENT PLAN)	\$0				
	Savings Goal or Creditor Name	Balance	Annual Interest Rate (APR)	Minimum Payment	Custom Sort	Mile Marker
1	MM1 - Periodic Expense Fund					1
2	MM1 - Cash Reserve Fund					1
3						
4						
5						
6			-			ļ
7		 	 		-	
8 9		+	 		1	
10		+	 			
11		+	 		1	
12			1			
13			1			
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25			1			
26						
27		+	 			
		1	 		-	
28		1	-		 	
29		1	 			
30						
31						
32						
33						
34						
35						
36						
37						
38						
39			1			
40			1			
	TOTALS	-		0		
	TOTAL					



Spending Plan SUMMARY	,
NO INCOME	\$0
NO GIVING	\$0
NO DIRECTED SAVINGS	\$0
NO DEBT	\$0
NO LIVING	\$0
Balanced - No margin	\$0

PURPLE = CONGRATULATIONS! - MARGI GREEN = BALANCED - Find more MARGIN RED = OVERSPENDING - Increase income

INCOME (Net Monthly) Employment Income From INCOME Tab Other Income From INCOME Tab Owner's Draw From BUSINESS SPENDING PLAN Other NET Income Other NET Income Subtotal	
Employment Income From INCOME Tab Other Income From INCOME Tab Owner's Draw From BUSINESS SPENDING PLAN Other NET Income Other NET Income	
Employment Income From INCOME Tab Other Income From INCOME Tab Owner's Draw From BUSINESS SPENDING PLAN Other NET Income Other NET Income	
Other Income From INCOME Tab Owner's Draw From BUSINESS SPENDING PLAN Other NET Income Other NET Income	
Owner's Draw From BUSINESS SPENDING PLAN Other NET Income Other NET Income	
Other NET Income Other NET Income	
Other NET Income	
Subtotal	
GIVING	
Church	Τ
Other	
Other	
Subtotal	
MARGIN AND SAVINGS	
MARGIN applied to MILE MARKER GOALS	
Directed Savings toward goal	
Directed Savings toward goal	
Directed Savings toward goal	
Subtotal	
HOUSING	
Rent/Mortgage	
Parking	
Gas / Electric / Water	
Insurance	
Cable / Wi-Fi	
Other	
Other	
Subtotal	
TRANSPORTATION	
Vehicle Insurance	
Fuel	
Car Wash	
Other	
Other	
Subtotal	
FOOD	1
Groceries	<u> </u>
Dining Out	<u> </u>
Fast Food	
Other	
Subtotal	
INSURANCE AND HEALTH	
Health Insurance - out of pocket	<u> </u>
Deductible and CoPay	
CoPay	<u> </u>
Prescriptions	
Subtotal	

	Şu
DEBT	1
Sum of Min Payments From MILE MARKER GOALS Tab	-
Other Debt not in MMG	
Other Debt not in MMG	-
Other Debt not in MMG	-
Subtotal	-
PERIODIC (Save for future expense)	
Vehicle 1 Registration	_
Vehicle 2 Registration	_
Vehicle Maintenance	_
Amazon Prime	_
Costco	_
Christmas gifts	_
Accountant and tax preparation	
Other	<u> </u>
Subtotal	
Justicial	
SUBSCRIPTIONS (monthly)	
Music	-
Apple+	-
Netflix	-
Cloud Storage	-
Spotify	-
Amazon Prime	-
Other	-
Other	-
Subtotal	-
HED DEDCOMAL	
HER PERSONAL	1
Clothes	-
Gym	-
Hair Care	-
Nails, Eyes	-
Other	-
Subtotal	-
HIS PERSONAL	
Clothes	-
Gym	-
	-
Barber	1
Barber Other	-
	-
Other Subtotal	-
Other Subtotal Children	-
Other Subtotal Children Clothing	-
Other Subtotal Children Clothing School Sports	-
Other Subtotal Children Clothing School Sports School Events	-
Other Subtotal Children Clothing School Sports School Events Other	-
Other Subtotal Children Clothing School Sports School Events	-
Other Subtotal Children Clothing School Sports School Events Other Subtotal	-
Other Subtotal Children Clothing School Sports School Events Other	-