

7 STEPS TO FINANCIAL WELLNESS

STEP 1: ASSESS YOUR SITUATION

Write down all your commitments, the value of your assets and your income streams.

STEP 2: SET GOALS

Make a list of the activities you need to undertake in order to change your current state for your desired future state and make a budget



Set Goals

STEP 3: MAKE A PLAN

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STEP 4: SECURE YOUR FINANCIAL FUTURE

Track your expenses, save regularly and invest where you can. If you cannot invest today, include it in your plan to get there tomorrow (very soon).



STEP 5: SELF-AUDIT

Check your financial statements to see if you are on track with your goal. Dig into the details.

STEP 6: IMPROVE YOUR FINANCIAL LITERACY

With a wide array of free courses, you can learn at everything you need to know at your own pace. The important thing is that you start the process and keep learning.



STEP 7: RINSE & REPEAT

Make a plan to repeat this exercise at least once per year. Every time your personal situation changes, is a good time to do some personal stocktaking.