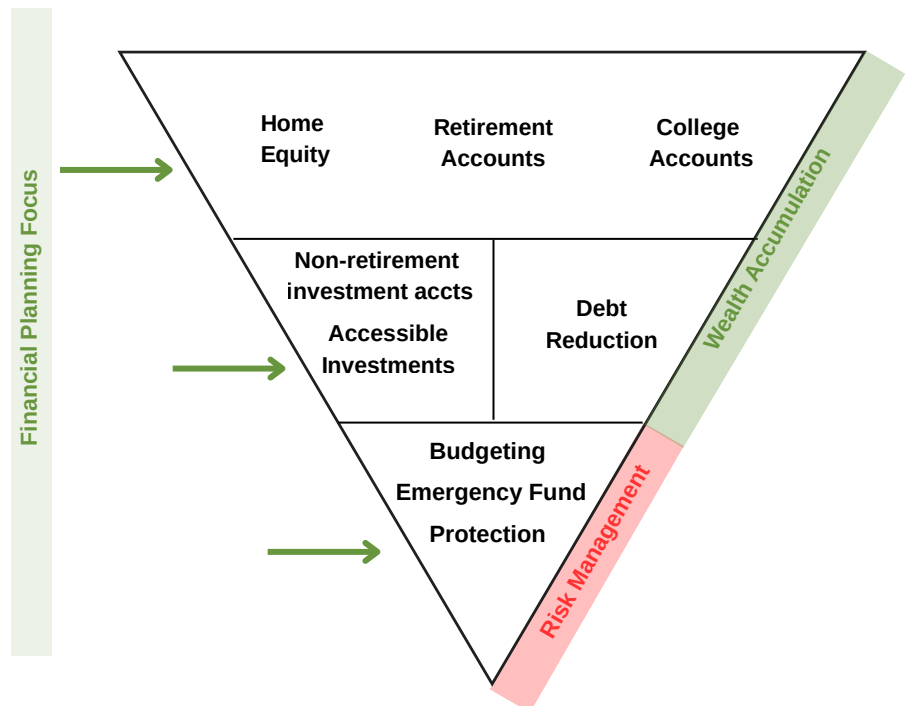
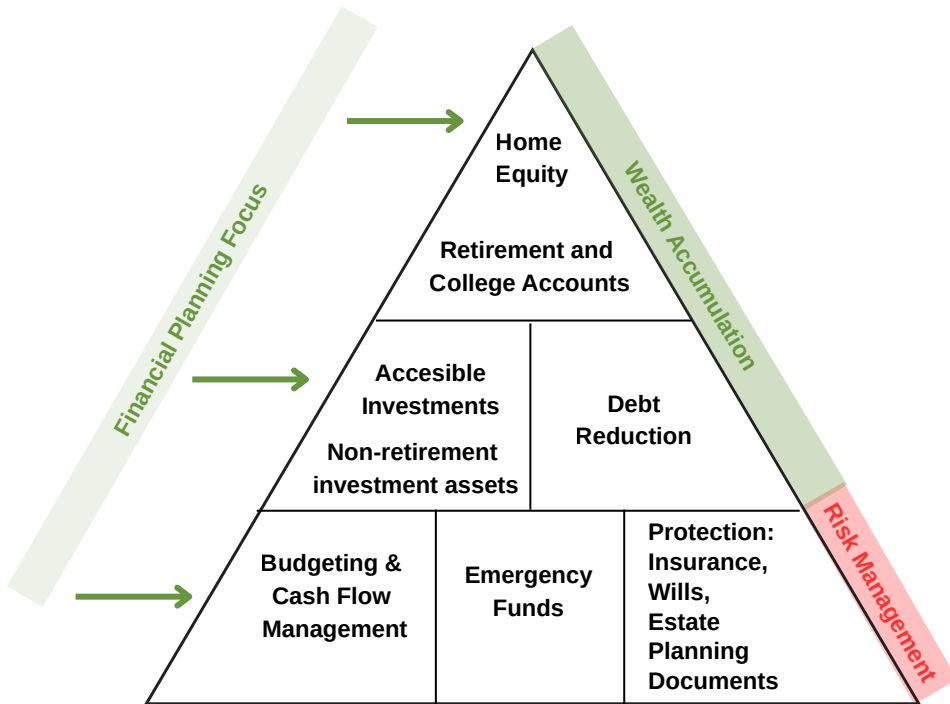




Fall Into Financial Planning

Financial Planning Pyramid: Interactive Worksheet

FINANCIAL
PLANNING
MONTH



This worksheet is designed to help you reflect on your financial plan by comparing the Upright and Inverted Financial Planning Pyramids. Use the prompts below to assess where you are today, where you'd like to be, and steps you can take to strengthen your financial foundation.



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— FINANCIAL —
PLANNING
— MONTH —

Choose Your Pyramid

Look at the two pyramids (upright vs. inverted).

- Circle or highlight the pyramid that best represents your financial plan today.
- In the space below, jot down why:

Explore Risk Management

Which areas are you least familiar with? (Check all that apply)

- ☐ Budgeting & Cash Flow Management
- ☐ A Strategy for Emergencies
- ☐ Protection (Insurance, Wills, Estate Docs)

Identify Action Gaps

What aspects of your plan have been hardest to put into action?

- ☐ Clearly understanding where your money is going
- ☐ Building a sustainable emergency fund
- ☐ Completing a Will and other important legal documents
- ☐ Getting the right insurance coverage in place
- ☐ Other: _____

Why this has been challenging for me:



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Gather Creative Solutions

Has anyone shared creative ideas or tools to help you?

- ☐ Apps or automation tools
- ☐ Effective money habits
- ☐ Best practices for simplification
- ☐ Establishing a one-year improvement vision
- ☐ Online resources

Solutions I'd like to explore with my planner:

Stress-Test Your Plan

Imagine a major life event happened today (job loss, illness, injury).

- Are your financial resources available or restricted?
- Would you feel flustered or confident?

My first steps would be...

Planner Discussion Notes

Use this space to log questions or notes to discuss with your planner:

From Reflection to Results

Use this worksheet to guide your thinking, then take the next step. An MBI financial planner is here to help you translate reflection into action and create a plan that works for every stage of life.

Start the Conversation with MBI



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