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Annual financial review worksheet



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FINANCIAL REVIEW

annual worksheet

Year · ____ Net worth now: £____ vs last year: £____

Savings · Emergency fund (3-6mo): £____ Goal: £____ On track: ☐

Debt · Total: £____ vs last year: £____ Highest interest: ____%

Pension · Balance: £____ Contributions: ____% Employer match maxed: ☐

Insurance check · Life: ☐ Income protection: ☐ Home: ☐
Renewed: ☐

ISA allowance used · £____ / £20,000 Tax year ends 5 April: ☐

Three money goals for next year · 1. ____ 2. ____ 3. ____

ONE HOUR A YEAR ON THIS IS WORTH
MORE THAN ANY SINGLE BUDGETING
SESSION

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