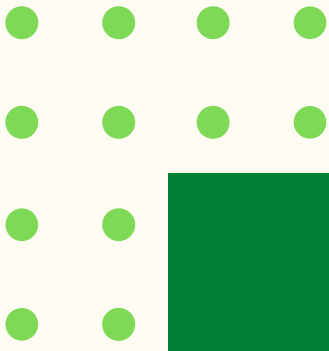


THE FINANCIAL ACADEMY



**PERSONAL
CHECKLIST**

Wealth



Personal Wealth Checklist

Be honest!

Are you 'financially cruising' or 'financially broken down and need a jump'?

Let's see just how serious you are about YOUR money!

- I CREATE AND STICK TO MY BUDGET WEEKLY
- I CLEARLY DISTINGUISH BETWEEN MY NEEDS AND WANTS
- I SAVE FOR IMPORTANT EXPENSES
- I HAVE ESTABLISHED AN EMERGENCY FUND
- I CREATE FINANCIAL GOALS
- I HAVE ALREADY STARTED SAVING FOR RETIREMENT
- I HAVE A SEPARATE ACCOUNT SPECIFICALLY FOR SAVING
- I AM AWARE OF LOCAL INVESTMENT OPPORTUNITIES TO EARN ADDITIONAL INCOME
- I KEEP A RECORD OF MY EXPENSES
- I AM GREAT AT PRIORITIZING MY EXPENSES
- I PLAN FOR UNEXPECTED EVENTS
- I MONITOR MY FINANCIAL HABITS FREQUENTLY
- I AM AWARE OF WHICH FINANCIAL HABITS I NEED TO IMPROVE
- I CONSIDER THE IMPACT OF MY FINANCIAL DECISIONS BEFORE SPENDING



10 - 14 : **BEAST MODE** | Great Job! You're well on your way to achieving financial security. Keep it up!

5 - 9 : **MORE GAS, LESS BRAKES** | This is a great start on your personal wealth journey! Continue to adopt good habits and build in those areas where you fell short.

0 - 4 : **SLOW AND STEADY** | The great news is you can only go up from here! Take this as a prescription to begin to turn you finances around. You can do this!

Now, ask yourself:

"Am I really taking my money seriously?"



THE FINANCIAL ACADEMY
"Smart Finances, Secure Future."

HERE'S A LITTLE ABOUT US!

The Financial Academy was established in November 2019 by Lakeisha A. Rolle. Our goal is to increase awareness of financial literacy and educate persons about the importance of adopting positive financial habits.

OUR MISSION

In keeping with the company's motto: "Smart Finances, Secure Future" its mission is to provide practical ways in which young persons can create a more secure financial future by making healthy financial choices today."

LET'S STAY CONNECTED!

Facebook: The Financial Academy
Instagram: @thefinancialacademy242

CONTACT US TO SCHEDULE A PRIVATE SESSION!

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