

MONEY CHECK-IN: Is Financial Coaching Right For You?

A 5-Minute Self-Check

Let's Get Honest About Where You Are (and Where You Want to Be)

There are no wrong answers here. This is just about helping you reflect on your current financial mindset, habits, and pain points — and decide what kind of support might help.

1. HOW ARE YOU FEELING ABOUT YOUR FINANCES?

- ☐ I feel **calm, confident**, and **in control**.
- ☐ I feel **somewhat organized**, but there's room to improve.
- ☐ I feel **anxious or overwhelmed** most of the time.
- ☐ I feel like I'm **barely scraping by**, just trying to survive.

2. WHAT CHALLENGES ARE YOU FACING RIGHT NOW?

- ☐ I live paycheck to paycheck.
- ☐ I don't know how much I spend each month.
- ☐ I've tried budgeting, but it never sticks.
- ☐ I have debt that keeps piling up.
- ☐ I want to save, but I don't know how to start.
- ☐ I avoid looking at my account because it stresses me out.
- ☐ I'm not confident I'll ever be able to retire.
- ☐ My partner and I aren't on the same page with our finances.
- ☐ I feel like money/debt controls my life.



3. WHAT ARE YOUR GOALS?

- ☐ I want to feel more confident with money.
- ☐ I want to stop living paycheck to paycheck.
- ☐ I want to pay off debt.
- ☐ I want to start saving consistently.
- ☐ I want to feel less stressed about finances.
- ☐ I want to make a plan I can actually stick to.
- ☐ I want to build a better future for myself/family.
- ☐ I want to be able to retire comfortably.

Results + Next Steps

If a lot of those challenges or goals hit home for you, the good news is, **you don't have to figure it out by yourself.**

If you're feeling overwhelmed, confused, or just stuck when it comes to money, financial coaching could be a game-changer.

If you're still unsure...

Here are some signs that coaching might be a good fit:

- You've tried things on your own, but nothing's worked long-term
- You want real accountability and support from someone who gets it
- You're ready to stop guessing and start making real progress
- You want clarity and peace of mind with your money

If you're already feeling confident...

That's amazing! Coaching isn't always necessary — but if you ever hit a wall, want help reaching that *next* goal, or just need an outside perspective, you know where to find me.

Want to talk it out?

Book a free, no-pressure [consultation](#) — just a chance to talk about where you are, where you want to go, and see if working together makes sense.

