



Financial Snapshot Worksheet

A clear, simple view of your current financial picture

Before You Begin

This is not about perfection or precision.

It's simply a way to gently see what is true right now-- so you can move forward with clarity.

Take a breath before you begin.

This is about awareness, not precision.



Part 1: Income

(What's Coming In)

List your current sources of income.

Primary income:

Additional Income (if any)

Other sources:



Part 1: Reflection

Does this feel:

- Stable
- Uncertain
- Changing
- Limited
- Other: _____



Part 2: Essential Expenses (What Must Be Covered)

List your core monthly needs.

Housing: _____

Utilities: _____

Food: _____

Transportation: _____

Insurance/medical: _____

Other essentials: _____



Part 2: Reflection

Do these expenses feel:

- Manageable
- Tight
- Overwhelming
- Unclear
- Other: _____



Part 3: Financial Commitments

These are ongoing obligations.

Debt payments:

Subscriptions/Recurring costs:

Other Commitments:



Part 3: Reflection

Are these:

- Necessary
- Flexible
- Heavy
- Something I haven't fully reviewed
- Other: _____



Part 4: Savings & Support

Savings (If any)

Emergency Support (Family, community, etc.)

Reflection:

Do I feel:

- Supported
- Somewhat secure
- Uncertain
- Fully exposed
- Other: _____



Part 6: A Simple Snapshot

Without overthinking:

Right now, my financial situation feels:

- Stable
- Tight but manageable
- Uncertain
- Overwhelming
- In transition
- Other: _____



Part 7: One Clear Next Step

Not ten steps. Just one.

What is one small, calm action I can take next?



Closing Reminder

Clarity is not about having all the answers.

It begins with:

- seeing what is true
- understanding what feels unclear
- taking one steady step forward

Your thoughts...
