



FINANCIAL CHECK

Clarity today. Security tomorrow.

A compact, fillable overview of your current financial situation and your next goals.



1

Gain an overview

2

Identify priorities

3

Plan next steps



Your Financial Check

Tick everything that already applies to you. Then count your ticks.

1. Monthly budget

- ☐ I know my monthly income.
- ☐ I know how much I spend each month.
- ☐ I review my expenses regularly.

2. Emergency fund

- ☐ I have savings for unexpected expenses.
- ☐ My emergency fund covers at least three months of essential expenses.

3. Regular saving

- ☐ I save money every month.
- ☐ I schedule my savings directly after receiving my income.

4. Financial protection

- ☐ My most important risks are adequately covered.
- ☐ My family would be financially protected in an emergency.

5. Investing

- ☐ I understand the difference between saving and investing.
- ☐ I invest in line with my long-term goals.

6. Retirement planning

- ☐ I have started planning for retirement.
- ☐ I review my retirement plan regularly.

7. Financial goals

- ☐ I have written down my financial goals.

8. Insurance & protection

- ☐ I know which insurance policies I genuinely need.
- ☐ I review my insurance coverage regularly.

My result

0-5 ticks: Significant room for improvement.

6-11 ticks: A good foundation - some areas need attention.

12-16 ticks: A very strong foundation - now focus on optimisation.

Reflect. Plan. Grow.

Which area currently needs the most attention?

My financial goals

1-year goal

5-year goal

10-year goal

My personal commitment

I commit to taking small, realistic steps consistently.

Name:

Date:



Your next steps

Every financial situation is different. A personal conversation can help you organise your priorities and identify suitable next steps.

1

Review your results

Which areas are already in a good position?

2

Set priorities

What is especially important in the next 6-12 months?

3

Develop a personal strategy

Which solutions fit your goals and situation?

Ready for greater financial clarity?



Book your free 45-minute financial consultation - with no obligation and tailored to your personal situation.

Book your free consultation

Scan the QR code or use the contact details:

Web: www.investwithchristine.de

E-mail: christine@investwithchristine.de

WhatsApp: +49 176 70932941



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