Worksheet: Define Your Financial Course Par

Hole (Life Area)	My 'Par' (What does success look like?)	Current Status (Strokes Taken)	Next Shot (What’s my next step?)
1. Income Management			
2. Emergency Fund			
3. Debt Management			
4. Saving Rate			
5. Investment Strategy			
6. Retirement Planning			
7. Home Ownership			
8. Travel/Fun Goals			
9. Legacy/Family Planning			

Worksheet: Financial Success Metrics – Quantitative vs Qualitative

Metric Type	Metric Description	My Current Level (1-10)	Target Level (1-10)
Quantitative	Net Worth		
Quantitative	Savings Rate (%)		
Quantitative	Investment Return vs Target		
Qualitative	Peace of Mind		
Qualitative	Confidence in Financial Decisions		
Qualitative	Freedom to Enjoy Life		

Worksheet: My Personal Financial Success Statement

Reflection Prompt	My Response
What does financial success mean to me?	
What would make me feel confident and calm about my future?	
What trade-offs am I willing to make to get there?	
What milestones (not money amounts) will help me track progress?	
What does 'winning my round' look like in life?	