

# Personal Action Checklist for \_\_\_\_\_

## Heart in Focus

### Priority Steps Checklist

- Give honorable % to the Lord = \_\_\_\_%
- Save \$1000 for Emergency Savings
- Implement Debt Elimination Plan
- Build tax advantaged savings = \_\_\_\_%
- Build up Large Purchase Savings fund
- Emergency Savings to 3-5 months expenses
- Build savings for children's education
- Pay off house early
- Increase long term savings to \_\_\_\_%
- \_\_\_\_\_
- \_\_\_\_\_

PERSONAL ACTION CHECKLIST

Financial Forms/Plan	Action Needed	Start date - end date
Spending Plan		
Giving Plan		
Emergency Fund Plan		
Large Purchase Fund		
Retirement Fund Plan		
Debt Elimination Plan		
Insurance Plan		
Will / Estate Plan		
Other:		