



Personal Financial Snapshot

Session 1 - How Money Really Works | Participant Resource | Version 1.0

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Your starting point

Cash flow: ☐ Clear ☐ Needs work ☐ Not sure

Emergency savings: ☐ Started ☐ Building ☐ Not started

Debt plan: ☐ Written ☐ Informal ☐ Not started

Protection: ☐ Reviewed ☐ Needs review ☐ Not sure

Saving and investing: ☐ Active ☐ Preparing ☐ Not started

Retirement and legacy: ☐ Organized ☐ Needs review ☐ Not sure

One priority

The area I most want to strengthen: _____

One question I want answered: _____

One action I can complete this week: _____

Education notice: FFES provides general financial education, not individualized investment, tax, legal, insurance, credit, mortgage, Social Security, Medicare, pension, or estate-planning advice. Rules and individual circumstances differ and can change.