

Mid-Year Financial CHECK-IN

Celebrate Your Progress

What is your biggest financial win so far this year?

What's something you're proud of financially?

FINANCIAL GOALS	PROGRESS %

Financial Health Snapshot

Check all that apply:

- ☐ Following a budget regularly
- ☐ Added money to savings this year
- ☐ Reduced debt
- ☐ Increased income
- ☐ Built or maintained an emergency fund
- ☐ Improved spending habits
- ☐ Contributed to retirement or investments

Reset for the Next 6 Months

Amount I Want to Save
by Year-End:

One Action I'll Take
This Month: