

DIY FINANCIAL PLANNING WORK BOOK

Learn --> Implement



MY LIFE, MY STYLE

Welcome to your DIY Financial Planning Workbook

Thanks for registering for this workshop.

Most of the times we tend to a lot, but we never take any action in personal finance. There may be number of reasons like,

“ I don't know “

“ Nobody in my friend's circle said this to me “

“ My Parents always recommended safer investments”

Time to look into the root causes and understand where you are right now to move to where you want to go in life

Participate fully and keep taking Actions after this workshop too.

All the very best

Name –

Family -

Dependents –

Age -

Date -

*** Refer Excel tools to understand more

1) Happy Money

- a) My Current Money belief system
- b) Root cause of this belief system
- c) Am I giving money happily to others ?
- d) Am I receiving money happily from others ?
- e) From now on, My belief system is going to be -
- f) Am I ready to receive Happy Money – Yes / No

2) My Financial Goals :

- a) My Financial goals
- b) Am I getting stopped while writing financial goals ?
- c) Do you have self doubts in achieving these financial goals ? Yes / No
- d) My primary self doubt
- e) What am I going to do now to overcome this self doubt ?

3) Money leaks :

- a) Common Money leaks –
- b) My Money leaks is happening in
- c) What am I going to do

- 4) Assets :
 - a) My Growing Assets –
 - b) My Dieing Assets –
 - c) Will these assets help me in achieving these financial goals ?

- 5) My risk assessment
 - a) What do I think my understanding on risk -
 - b) Is my understanding correct ? –

- 6) Products –

Income – Savings = Expense

Refer Excel tools to understand more

- a) My income
- b) My Savings
- c) My Expense
- d) Am I saving 20-30% of my income ? –
- e) My monthly/yearly investment amount ?
- f) My current Investments

Mutual funds

Stock Market

Real estate

Post office

Bank deposits

g) My Current Insurance

ULIP

Term Insurance

LIC

Other Insurance Policies

h) Am I investing according to my goals ? –

i) Am I investing sufficiently ? Yes / No

j) Investment amount i need to plan ?

k) New investment products & When am I going to start ?

l) Where am I going to invest ?

m) Am I sufficiently insured ?

n) How much Term insurance is needed for me ?

O) How much Health insurance is needed for me ?

Other needed Insurance policies ?

P) When am I going to take all insurance policies ?

7) My Review system –

Notes