MID-YEAR CHECKUP IN 45 MINUTES



Where is Your Money Going?

Look at the last 2–3 months

Spot overspending

Adjust for today's expenses

Check Savings & Debt: Are You Making Progress?

Debt balances & interest rates

Increase savings slightly

Pay a little extra on debt

Set Simple Goals & Focus on What's Next

Pick 1–2 priorities

Make goals specific

Keep them realistic

Your 45-Minute Plan

15 min: Review spending

15 min: Check savings & debt

15 min: Set goals