



Secret Money Business *for mums*

LESSON 2 - WORKSHEET [1]

Do a stock take of your finances

Use this sheet to record account details & policy numbers that relate to the management of your family's finances.

Tax File Numbers: [list for both]

Household Bank Accounts: [List Account Name / BSB / Acc. Number]

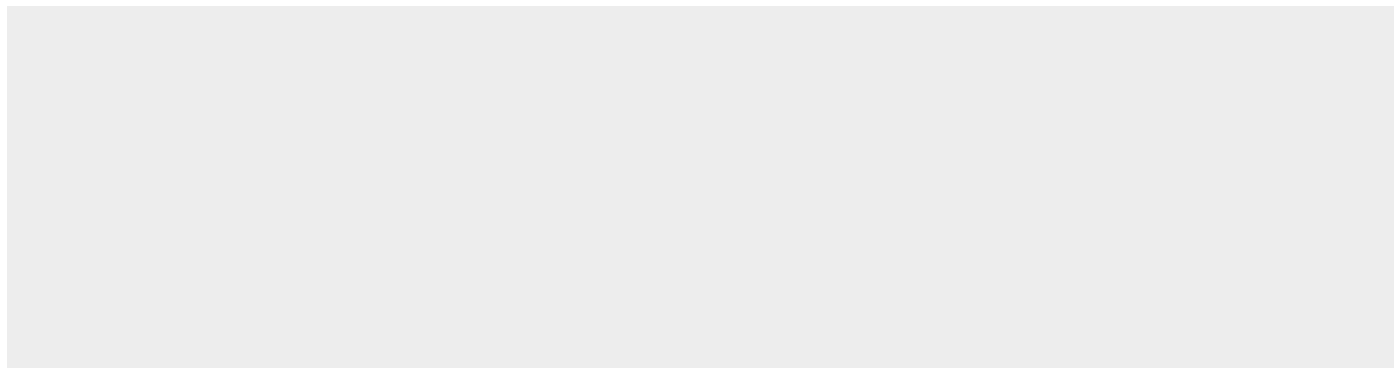
Credit Cards [List card number / credit limit / current balance]

Loans: [List loan Type / BSB / Account Number]

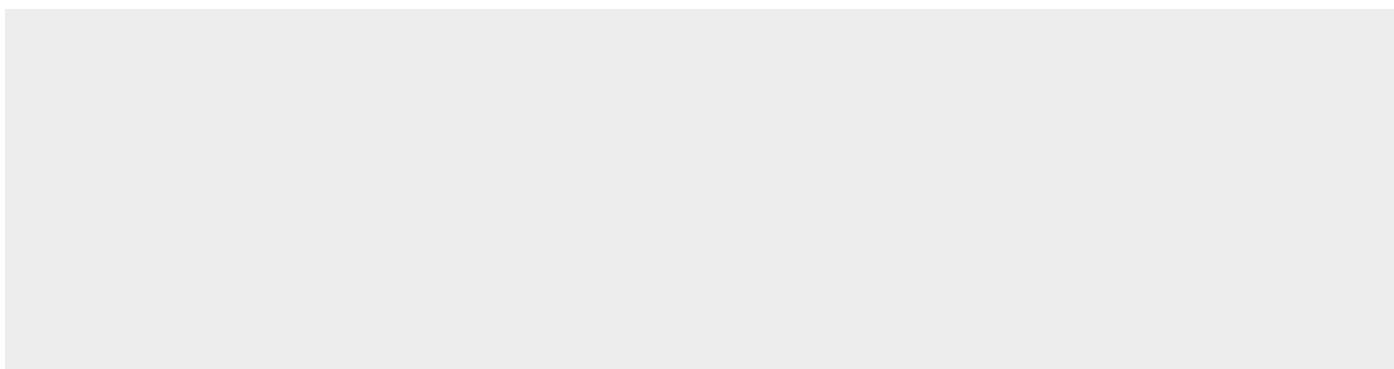


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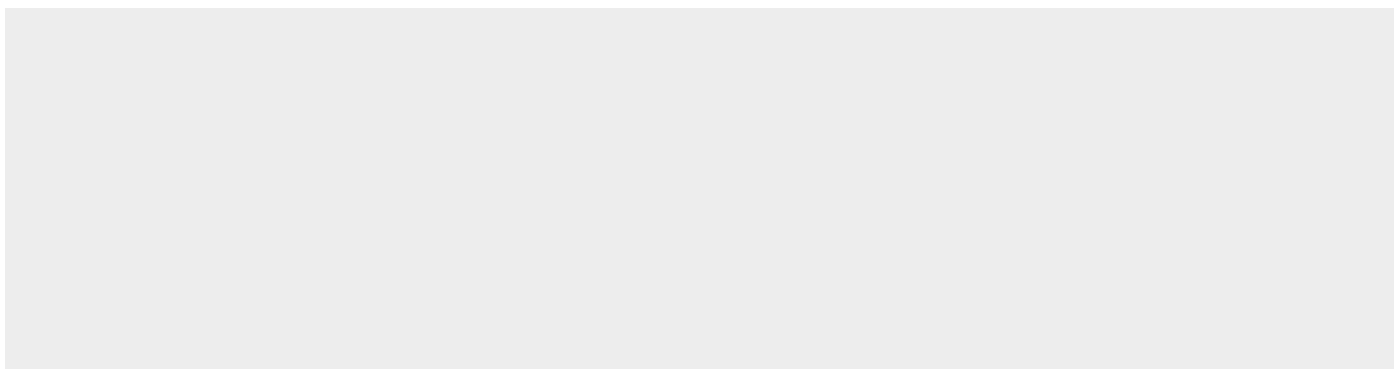
Household Insurance Policies [List policy type / policy number / level of cover]



Life Insurance Policies [list policy type e.g. death cover / policy # / level of cover]



Superannuation Accounts: [List institution / member No. / balance]





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LESSON 2 - WORKSHEET [2]

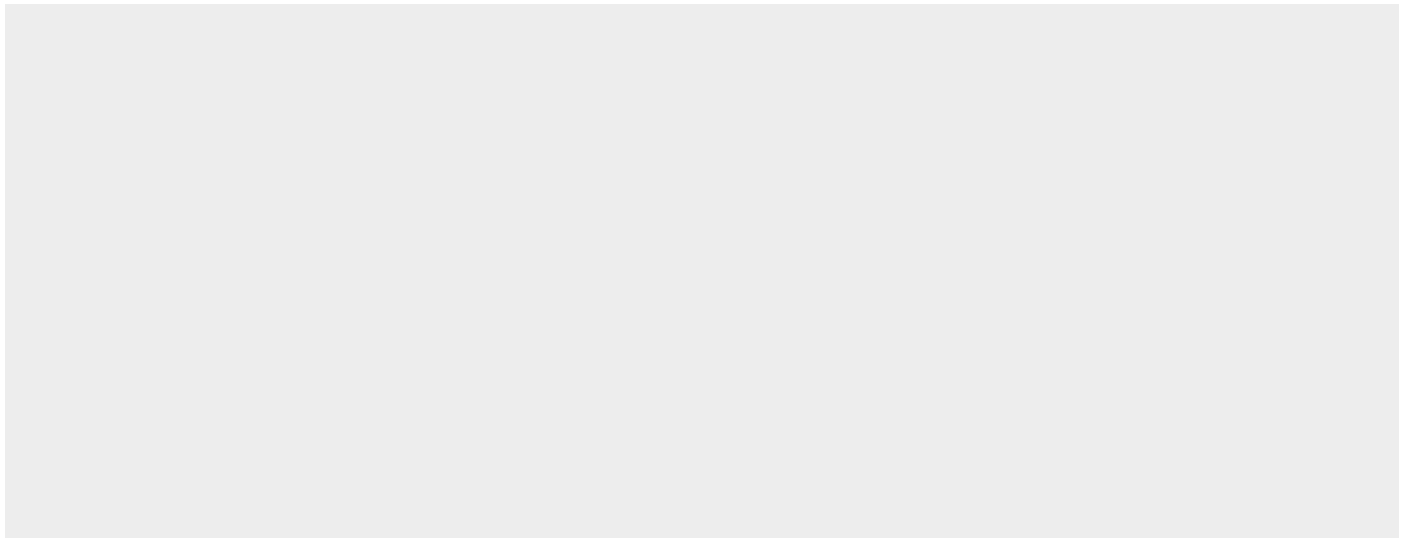
Your Road Map to Mindset Success

Use this sheet to help you work through the steps needed to re-frame your money mindset for success.

STEP 1 - FOCUS ON YOUR BIG PICTURE

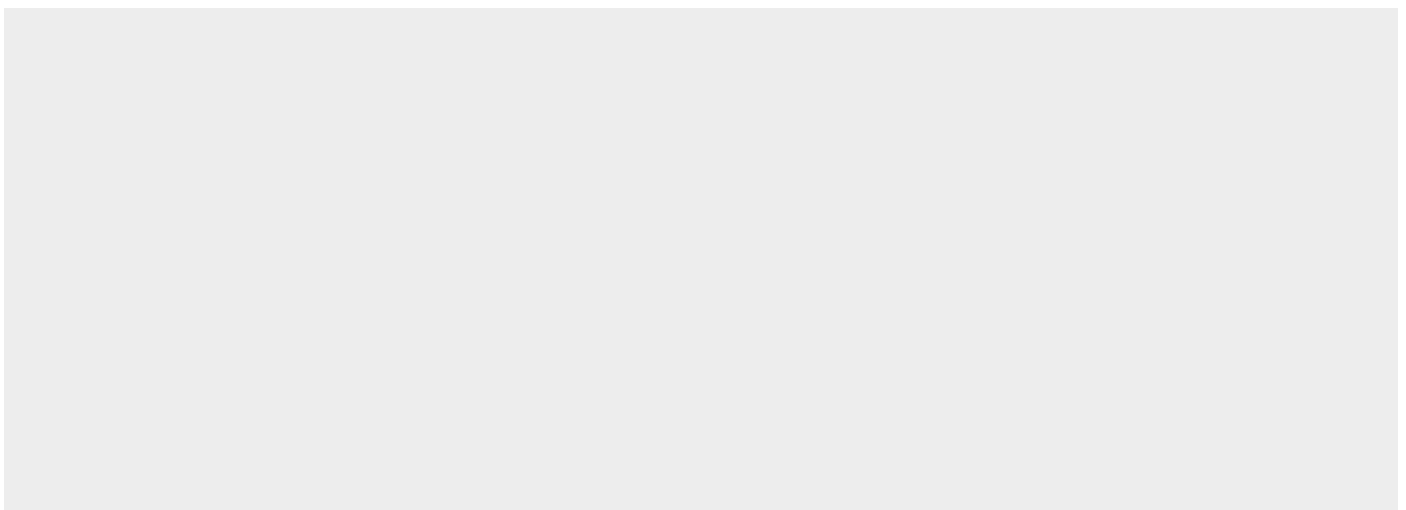
Promote yourself to Family CFO [Chief Financial Officer]. If you haven't already done so, complete the Financial Inventory Worksheet from this lesson to do a stock take of your family financial situation.

Then in the box below - start to write down the areas of your family's finances that you think may require some attention.



STEP 2 - LET GO OF THE PAST!!

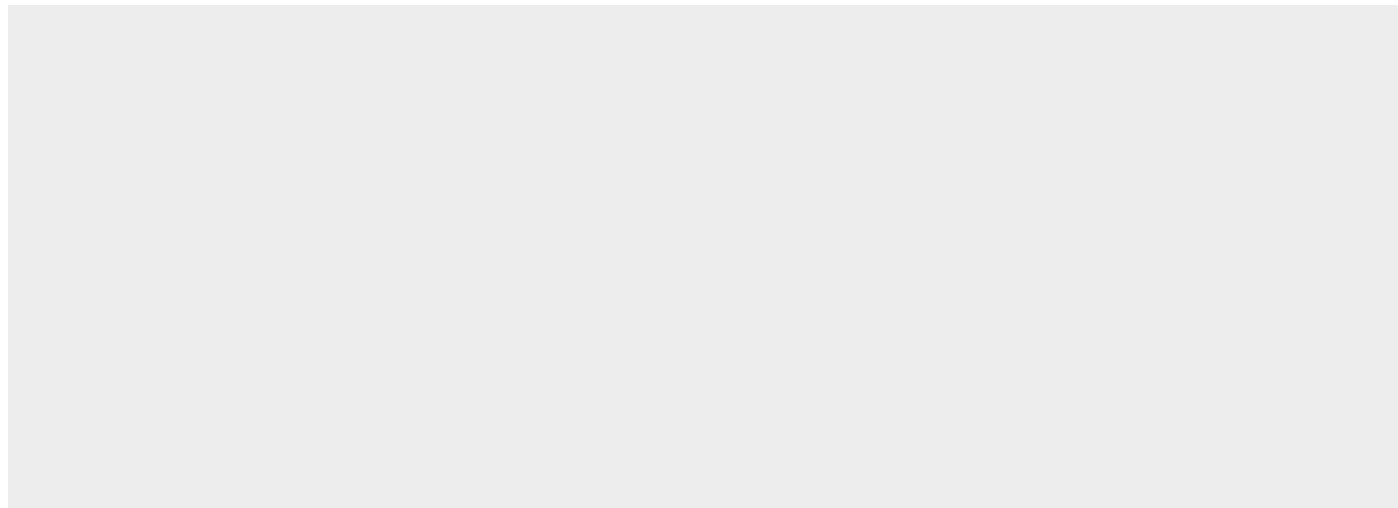
Women can be their own worst enemy when it comes to money & mindset. No one gets it right 100% of the time. Right down what you are embarrassed / ashamed or frustrated about when it comes to decisions you've made in the past with money. NOW FORGIVE YOURSELF - IT'S TIME TO MOVE ON LADY!!!



STEP 5 - DITCH THE BAD HABITS

We all have them BUT your bad financial habits will wreak more financial havoc than biting your nails!

Write a list of 5 GOOD financial habits that you are going to start from today. [E.g. writing a family budget, saving consistently etc.]



STEP 6 - TIME TO SET SOME GOALS

There is a whole worksheet dedicated to goal setting in the next lesson but you can start brainstorming here.

No need to be too specific - just make a list of your TOP 5. If you're struggling to come up with five, pretend you are just about to meet your fairy godmother - who will grant you FIVE wishes.

What are you dreaming about now??

