

Current financial picture

Build a private snapshot of resources, obligations and missing records.

Build on earlier weeks: Use the goals and priorities from weeks 1-2 to see which resources might serve which needs. Avoid counting one resource twice.

What I have and owe

List broad asset and debt categories. Amounts are optional and stay private; do not write account numbers.

What comes in and goes out

Name income sources and recurring obligations. Mark variable or unverified items.

Availability and records

Which resources are available soon? Which have restrictions or need further questions?

Unknowns to verify

Name one missing record, where I can obtain it safely, and a next step.

Keep private: Use categories or initials. No account numbers, passwords, health details or other people's private information. This paper is yours; do not upload it to the site.

An inventory is a starting point, not a valuation or confirmation of sufficiency.

Reading pool: Retirement X-Ray printed 103-109; Steward's Code Ch.9 pp.53-58 — printed pages in retrieved pre-editor manuscript; instructor review required. Source map and review gates accompany the curriculum.