

MID-YEAR

Money



Review
Worksheet



Mid-Year Money Review Worksheet

Check In. Reset. Move Forward With Confidence.

The “Mid-Year Money Review Worksheet” is designed to help users reflect, assess, and plan, and naturally lead them to consider 1:1 coaching for accountability and support.

Step 1: Reflect on the First Half of the Year

What were your top 3 financial goals for this year?	
Goal 1:	
Goal 2:	
Goal 3:	

What progress have you made so far?
(Be honest and specific.)

What money wins are you most proud of?

What challenges or setbacks did you face?

Step 2: Review the Key Numbers

Fill in what you know, estimate if needed.	
Total income (Jan–June):	\$
Total expenses (Jan–June):	\$
Total savings added:	\$
Total debt paid off:	\$
Current credit score (if known):	\$

Step 3: Mid-Year Financial Checkpoints

Rate yourself 1-5 (1 = struggling, 5 = strong)

Area	Rating (1-5)	Notes/Thoughts
Budgeting consistently		
Saving toward goals		
Debt repayment progress		
Spending habits		
Financial confidence		

Step 4: Set Your Next 3 Money Goals

Looking ahead, what do you want to focus on from now until December?

1.

2.

3.

Step 5: Your Next Best Step

What's one action you can take this week to move closer to your goals?



You're One Step Closer to Financial Clarity

Taking time to reflect on your finances mid-year is a powerful move.

Whether you're feeling proud, overwhelmed, or somewhere in between – remember: progress starts with awareness.

- ✓ You've reviewed what's working
- ✓ You've identified where you're stuck
- ✓ You've set goals for the second half of the year

Now imagine what you could accomplish with a personal coach in your corner – helping you stay focused, make smart decisions, and actually follow through.

Let's Keep the Momentum Going

Your next step:

 **Schedule a free 1:1 Mid-Year Money Check-In Call**

Together, we'll turn your worksheet insights into a simple, focused action plan.

 [Click here to book your session](#)

Limited June spots available!

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