1. FINANCIAL AWARENESS CHECK

Know where you stand.

Awareness is the foundation of every good financial decision.
This workbook will help you see your current position clearly,
so you can make informed choices and build confidence.

1. CURRENT POSITION SNAPSHOT

Complete this snapshot of your current financial position.

INCOME (MONTHLY)	£
Salary / Wages	
Pension	
Benefits	
Other Income	
TOTAL INCOME	

ESSENTIALS (MONTHLY)	£
Housing Costs	
Transport	
Food & Household	
Utilities	
Insurance	
Debt Repayments	
Other Essentials	
TOTAL ESSENTIALS	

SAVINGS & INVESTMENTS	£
Cash Savings	
Investments (ISAs, Shares etc.)	
Pension Value	
TOTAL SAVINGS & INVESTMENTS	

DEBTS & COMMITMENTS	£
Credit Cards / Store Cards	
Loans	
Mortgages	
Other Debts	
TOTAL DEBTS	

NET POSITION (TOTAL INCOME minus TOTAL ESSENTIALS)	£

2. AWARENESS QUESTIONS

Tick the response that is most true for you.

QUESTION	YES	PARTLY	NO
Do you know your total monthly income after tax?	☐	☐	☐
Do you track your spending every month?	☐	☐	☐
Do you have a clear picture of your total debt?	☐	☐	☐
Do you have an emergency fund in place?	☐	☐	☐
Do you regularly review your financial position?	☐	☐	☐
Are you on track with your financial goals?	☐	☐	☐
Are there any financial decisions you are avoiding?	☐	☐	☐

INSIGHTS & NOTES

What stood out for you from this check?

3. YOUR ACTION PLAN

Choose no more than three actions for the coming month.

ACTION	WHY THIS MATTERS	TARGET DATE
1.		
2.		
3.		

4. REVIEW DATE

Set a date to review your progress.

I will review this check on: _____ / _____ / _____

Clarity comes before confidence.
You cannot change what you cannot see.
Review regularly.
Small steps create lasting change.

This is one of the Five Pillars of The Market Man Method™.
Use it as often as you need.
Awareness is the first step to freedom.

More free tools and resources are available to help you take action and build a better future.

Visit: themarketmanmethod.co.uk