

LOVE & MONEY / YOUR FINANCIAL JOURNAL

FINDING FINANCIAL "HARMONEY"

1. Review your SMART goal and the steps you plan to take. Who will be responsible for the actions you agreed upon?

2. How will you manage competing priorities?

3. How will you manage bank and credit accounts?

Bank: Joint Separate Combination

Credit: Joint Separate Combination

Organize financial documents

INITIALS	ACTION ITEM	DUE DATE	COMPLETE
_____	Gather documents and financial records	_____	_____
_____	Sort (by month or category)	_____	_____
_____	Review (action or file)	_____	_____
_____	File (electronic or paper)	_____	_____