

CHAPTER 9 WORKSHEETS

to accompany your journey with
He Spends She Spends



smarter
STEWARDSHIP

THE FINANCIAL SQ

☐ General ☐ Spending ☐ Saving ☐ Investing ☐ Giving ☐ Taxes ☐ Planning ☐ Counsel

If we were sitting here a year from now, what would have to have happened for you to feel confident you had made faithful progress in your stewardship?

1	_____	_____
2	_____	_____
3	_____	_____
4	_____	_____
5	_____	_____
6	_____	_____
7	_____	_____
8	_____	_____
9	_____	_____
10	_____	_____
11	_____	_____
12	_____	_____
13	_____	_____
14	_____	_____

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THE 'FINANCIAL 4' LISTS (inspired by Tom Paterson's "Four Helpful Lists")

☐ Overall ☐ Spending ☐ Saving ☐ Investing ☐ Giving ☐ Taxes ☐ Planning ☐ Counsel

LIST #1 - What's *RIGHT* with your finances?

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
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LIST #2 - What's *WRONG* with your finances?

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LIST #3 - What's *MISSING* with your finances?

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LIST #4 - What's *CONFUSING* with your finances?

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MY TRUE MONEY GOALS

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____

YOUR ACTION PLAN

1 – State your GOAL clearly and when you plan for it to be COMPLETED

2 - Check the box below that corresponds with the topic(s) of your goal

☐ Overall ☐ Spending ☐ Saving ☐ Investing ☐ Giving ☐ Taxes ☐ Planning ☐ Counsel

3 – Why is it IMPORTANT to you?

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4 – How will it GLORIFY God?

5 – How does SCRIPTURE support/guide?

6 – How will you FEEL when you reach your goal?

7 – What RESOURCES do you have that could help you?

8 – What may you need to STOP doing?

9 – What will you need to START doing?

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10 – How will you use your relationships for ACCOUNTABILITY?

11 – What INFLUENCERS (fear, greed, traps, barriers, hazards, etc.) might you encounter?

12 – What is your plan to CONQUER those influencers?

13 – What is your FIRST STEP toward your goal?

14 – What is your SECOND STEP toward your goal?

15 – When will you take ACTION? 1 (now) 2 - 3- 4 - 5 (soon) 6 - 7 - 8 – 9 – 10 (will be awhile)