



My Yearly Action Plan

for

The Top 3 Goals I want to make progress on this year are:

- 1.
- 2.
- 3.

The biggest roadblocks that could stop or slow my progress towards these goals that I need to plan around are:

- 1.
- 2.
- 3.

I'm setting aside the following times to work on my financial wellness:

- A. My dedicated 30 minute weekly time I'm putting on my calendar is going to be on: _____
(day of week) at _____ am / pm
- B. My 2 hour dedicated monthly time will be on the (1st 2nd 3rd 4th) (Sun Mon Tues Wed Thurs
Fri Sat)(circle the appropriate week and day)

I've filled in my ratios:

- ☐ Emergency Funds
- ☐ Credit Score
- ☐ Average Tax Rate
- ☐ Debt Ratios
- ☐ Savings Ratio

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The two factors I am going to use to track my progress weekly are:

- 1.
- 2.

I'm going to share my success and challenges bi-weekly with:

(Choose at least 1 person who care about your success)

- 1.
- 2.

At the end of this year, when I accomplish these things, I am going to celebrate by: