Automation for Wealth™

Wealth Automation for Busy Clinic Owners

sMC

Notes

Check List - Scale my Clinic Webinar to Score Yourself

Overall

- ☐ In the last 3 months, I have reviewed my personal financial situation?
- ☐ In the last 3 months, I have calculated my overall net worth?
- ☐ I have set my financial goals for 2022?
- ☐ I have a systems based approach to my personal finances?
- ☐ In the last 3 months, I have thought about strategies to increase my income?
- ☐ I know what my retirement portfolio number (or yearly required income) is?

Saving

- ☐ I always “pay myself first”?
- ☐ My savings rate is at least 20%?

Budgets

- ☐ I follow a budget?
- ☐ I itemise my budget on a monthly basis such that it is unique?

Emergency funds

- ☐ I have at least 3-6 months worth of expenses saved up for emergencies?

Personal Insurance

- ☐ I have reviewed my income protection, TPD, Trauma/Critical illness, Life insurance in the last 12 months?
- ☐ I understand the upcoming changes to Income protection?

Debt

- ☐ In the last 3 months, I have reviewed by debt situation?

Superannuation

- ☐ I always maximise $25,000 concessional contributions to my superannuation?
- ☐ I know what the fees are for my super investments?

Investing

- ☐ In the last 3 months, I have invested my savings into an asset class I understand?
- ☐ I know the returns I get every 12 months?

Automation

- ☐ I have an automated system for my savings and investments?

Fees

- ☐ I know the exact fees I am being charged by my financial advisor, superannuation fund, and investments?
- ☐ In the last 3 months, I have reviewed all of the fees for my investments?

Wills and Estates

- ☐ In the last 3 months, I have reviewed my Will and estate planning?

Learning

- ☐ In the last 3 months, I have learnt (or revised) at least 1 financial concept/principle which applies to my personal finance?

Next

	Name	Date
Takeaways		
Top 3		
Actions		