



Confronting Your Reality

Starter Worksheet

Need help? See our YouTube
video on this sheet
@askesismindset

Financial Inventory

Debts

Income Sources

Assets

Essentials to Confront

All Accounts

Recurring Obligations

Financial Influences



Confronting Your Reality

Starter Worksheet

Need help? See our YouTube video on this sheet @askesismindset

What parts of your financial life are you avoiding? Just place a check mark. You're not fixing this today, just bringing it into the light.

Without judgement, how would you describe your financial personality right now. You can check as many that apply to you.

Avoidance Zones

Unopened bank statements	
Unread emails from lenders	
Conversations with family/partner	
Forgot financial login passwords	
Don't know credit score	
Feels bad when someone says retirement	
Avoid looking at paystub	
Assume someone else is handling things	
Not saying you can't afford it to a friend	
Saying budgeting doesn't work for me	
I'm just bad with money	
Bills or debts you've ignored	
It's not that bad if I don't know	
I just need to make more money	

Default Money Identity

Avoider	
Hustler	
Saver	
Spender	
Overwhelmed	
Drifter	
Planner	
Investor	
Minimalist	
YOLO	
Unconscious	
Optimist	
Budgeter	
Anxious	