

FINANCIAL HEALTH CHECKLIST

What to Do Weekly, Monthly, Quarterly and Annually

Written By Brian Kluth for the free online training at BlessYourFinances.org and NAEfinancialhealth.org

Weekly

- Write down or email yourself a list of God's provisions the past 7 days ([article](#) - [audio teaching](#)) and transfer a portion or percentage of all your financial income, blessings and provisions into a Blessings Fund giving account. Give to your church as your first giving priority and then to missions, ministries, projects and people as led by the LORD on a weekly, biweekly, monthly, occasional or one-time basis.

Monthly

- [Month-to-month guide for improving your finances](#)
- Pay bills
- Review/reconcile bank statements
- Review credit card statements for false charges
- Download or record income and expenses by budget categories
- Review income and expenses against budget plans - discuss, pray about and adjust as needed
- _____
- _____

Quarterly

- Make any quarterly estimated tax payments (if needed)
- Review your investment plans and accounts
- Review and update your net worth statement – [App](#) – [Excel file](#)
- _____
- _____

Annually

- Download [Bless Your Finances](#) worksheet with 33 Best Practices and 180+ Online Resources
- Review expenses and make spending/budget plans [Video \(2min\)](#) - [Calculator](#) - [Article](#) - [Charts](#) - [Audio \(11min\)](#) - [Audio \(13min\)](#)
- Set financial goals for 1, 3, 5 or more years [Why?](#) – [How?](#)
- Prepare and turn in taxes
- [Check your FICO credit score](#)
- Listen to biblical financial teaching [online](#) or from your favorite Christian financial teachers
- Review and update the [list and value of your financial accounts](#)
- Review and update will and estate plans
- Review and update Christian giving [Weekly/Monthly/Annually](#) – [Assets/Estate/Bequests](#)
- Review and update children guardianship choices
- Review insurance coverages (auto, home, life, disability, etc.)
- Review and update [assets and possessions](#)
- Review and update your [financial retirement plans](#)
- Declutter, deaccumulate and Let go of unneeded stuff [Sermon](#)
- _____
- _____