Holistic Wealth Reset Checklist

Financial Health

- ☐ Do I have clarity on my income, expenses, and savings goals?
- ☐ Am I actively reducing debt or managing it wisely?
- ☐ Do I have an emergency fund with at least 3-6 months of expenses?
- ☐ Have I reviewed my investments and retirement plans recently?
- ☐ Am I spending intentionally or out of habit/emotion?
- ☐ Is my giving (charity, tithing, community support) aligned with my values?

Mental & Emotional Health

- ☐ Am I regularly managing stress in healthy ways?
- ☐ Have I taken time to rest and unplug recently?
- ☐ Are my boundaries with people, work, and commitments healthy?
- ☐ Am I processing unresolved emotions or trauma with support?
- ☐ Do I have tools/practices to support my emotional resilience?

Physical Health

- ☐ Am I nourishing my body with healthy food?
- ☐ Am I getting enough restful sleep?
- ☐ Is my body moving regularly (exercise, stretching)?
- ☐ Am I scheduling regular health checkups?

Holistic Wealth Reset Checklist

Social & Relationships

- ☐ Do I have healthy, life-giving relationships in my life?
- ☐ Am I nurturing my key relationships intentionally?
- ☐ Have I let go of toxic connections or set needed boundaries?
- ☐ Am I part of a community that supports my growth?

Spiritual Health & Purpose

- ☐ Am I connected to a purpose greater than myself?
- ☐ Do I make space for reflection, prayer, or meditation?
- ☐ Am I aligned with my core values in daily life?
- ☐ Am I giving back or serving in ways that feel meaningful?

Holistic Wealth Self-Check Questionnaire

Answer honestly with **Yes / No / Sometimes**

Ready for a Reset (0–6 Yes answers) - Growing (7–11 Yes answers) - Thriving (12–15 Yes answers)

- ☐ Do I feel at peace with how I manage my money?
- ☐ Have I experienced gratitude today?
- ☐ Do I trust myself to make wise decisions?
- ☐ Do I regularly invest in my personal growth?
- ☐ Am I living in alignment with my purpose?
- ☐ Do I feel empowered to navigate life's setbacks?
- ☐ Do I practice forgiveness — towards myself and others?
- ☐ Am I nurturing the relationships that matter most?
- ☐ Have I created margin in my life for rest and joy?
- ☐ Do I feel mentally and emotionally strong today?
- ☐ Am I caring for my health in sustainable ways?
- ☐ Do I feel connected — to community, family, or faith?
- ☐ Am I living with intentionality or on autopilot?
- ☐ Do I believe I am worthy of abundance in all forms?
- ☐ Am I open to learning from life's lessons?

Reflect on your "No" or "Sometimes" answers

- Choose 2-3 areas to focus on for your **personal reset plan.**
  (e.g., track your spending, schedule a health checkup, reconnect with a mentor).
- Consider using this check-in every quarter or after major life changes

Holistic Wealth Personal Reset — Gap Analysis & Reflection Questionnaire

Gap Analysis Checklist

Reflect on each area below. Check (✓) where you feel strong and mark (✕) where you feel a gap or depletion. Add notes if you wish.

Area	Thriving (✓)	Needs Attention (✕)	Notes (Why?)
Financial Health			
Emotional Health			
Mental Health			
Physical Health			
Relationships			
Spiritual Life/Purpose			
Time Management			
Boundaries & Balance			
Career & Personal Growth			
Giving Back/Impact			

Reflection Questions:

1. Which area(s) feel most depleted or out of sync?
2. What's one simple step I can take to nurture this area?
3. What support, resource, or habit could help me close this gap?
4. Am I asking for help when I need it?
5. What's stopping me from making progress in this area?

Get your copy of the **Holistic Wealth (Expanded and Updated): 36 Life Lessons to Help You Recover from Disruption, Find Your Life Purpose, and Achieve Financial Freedom.**

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