



# Sacred Money Date Quarterly Review

This is your quarterly check in! How are you doing? Use this form every quarter (January 1, April 1, July 1, October 1) to check in on your progress. Why quarterly? Several reasons including: review quarterly tax payments, review the possibility of taking profit, make sure things are on track for you goals and finally to make sure you've got this.

A quarter is every three months. Especially early on, you'll need to review your process to make sure it's working well and that you're getting the results you want to see. If not, it'll be time for some course correction.

(And if you don't see a profit, it might be time for a check in with someone you trust to help get you on track!)

Today's Date: \_\_\_\_\_

Reminders:

- I have my tools ready and available!
- I have my Sacred Money Date Support set up
- I have the last 3 money date notes and/or my Profit and Loss report to review

I am grateful for \_\_\_\_\_

\_\_\_\_\_

First, These are my major successes!

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Second Review your goals. These were my goals 3 months ago:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

3. These are the goals for my next 6 months:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Next Action Steps for Each Goal:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Well DONE!**

Celebrations and Accomplishments for Today – You Deserve Them!:

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