



# ***Your Financial Wellbeing Check-In***

**3 in 5**

employees say money  
worries affect their  
ability to do their job.



***A simple 10-minute check-in for  
National Financial Awareness Day.***

We often make time to check in on our physical and mental wellbeing, but our finances can easily slip down the priority list.

**National Financial Awareness Day** is the perfect opportunity to pause, take stock and understand where you are today. This simple check-in is designed to help you reflect on your financial wellbeing and identify small steps that could make a big difference.

# Your Financial Check-In

Take a few minutes to answer the questions below. There's no right or wrong answer, this is simply a chance to reflect on your financial wellbeing today.



## Day-to-day money

### 1. *How confident do you feel about your everyday finances?*

- ☐ I know how much money comes into my account each month
- ☐ I have a good idea of where my money goes
- ☐ I can comfortably cover my essential monthly expenses
- ☐ I regularly review my spending
- ☐ I feel in control of my day-to-day finances



## Savings & safety net

### 2. *Are you prepared for the unexpected?*

- ☐ I have money set aside for emergencies
- ☐ I save regularly, even if it's only a small amount
- ☐ An unexpected expense wouldn't cause me significant financial stress



- ☐ I'm contributing to a pension
- ☐ I have clear financial goals
- ☐ I know what I'm saving towards
- ☐ I review my financial plans at least once a year

[illegible]

# ***Small steps can make a big difference***

Improving your financial wellbeing doesn't mean changing everything overnight. Often, it's the small, consistent actions that have the biggest impact over time.

If you completed the check-in on the previous page, you've already taken the first step. Now, choose one action you'd like to take over the next few weeks.



## ***Choose your next step***

- ☐ Review my monthly budget
- ☐ Set up or increase a regular savings payment
- ☐ Check how much I'm paying into my pension
- ☐ Review my insurance or protection cover
- ☐ Pay off a little extra from outstanding debt
- ☐ Cancel subscriptions I no longer use
- ☐ Set a short-term savings goal
- ☐ Learn more about a financial topic I'm unsure about
- ☐ Book time to review my finances or start a financial plan
- ☐ Speak to someone for financial guidance or advice

## ***My personal goal***

The one thing I'm going to do after completing this check-in is:

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## ***Remember you don't need to have everything figured out today.***

Financial wellbeing is about making informed decisions, building good habits and feeling more confident about your future, whatever stage of life you're at.

Every small step you take today can help build a stronger financial future tomorrow.

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### **Need a little extra support?**

Whether you're planning for the future, reviewing your finances or working towards a specific goal, you don't have to do it alone. Our team is here to help you understand your options and make informed financial decisions with confidence.

***Get in touch with the team to find out how we can support you.***

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