

Money Check-In Guide

Before you dive in, set yourself up for success!

How It Works: Managing your finances can be tough, but science shows that when we make something enjoyable, we're more likely to turn it into a habit. This can apply to your money too! Here are a few tips to help to make your financial check-ins something to look forward to.

Set the Mood

- Pick a clean and comfortable space with minimal distractions
- Grab your favorite drink—coffee, tea, a smoothie, whatever feels like a treat
- Prepare a positive money affirmation to help get you in the right mindset

Get Your Tools Ready

- Grab your favorite notebook, pen, and highlighters
- Choose your favorite money tracking format (i.e., an excel sheet, printed templates, an app etc.)
- Have your bank statements, bills, and any financial documents available

During Your Check-in

- Eliminate all distractions, like putting your phone on silent
- Do some deep breathing or meditating before you start
- After you're done, celebrate small wins, go for a walk or eat your favorite snack

Make It Stick

- Make it official by picking the next date and time and put it on your calendar
- Invite a trusted friend or partner to do their own check-in for accountability
- Track how you feel before and after your check-in.



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