



NORTHBOUND

A CALM OPERATING SYSTEM FOR MODERN LIFE.

Free download

Financial organisation checklist

Use this checklist as your financial reset.

Most people's financial life is scattered — a few accounts here, a drawer of paperwork there, a vague sense of what's owed and where. There's no single place that shows the whole picture.

This download gives you a one-time checklist to bring everything into one place, plus a simple worksheet to revisit once a month. Work through the checklist once, then keep the worksheet handy for your monthly check-in.

If you want a complete, calm system for managing money all year round, that's what Calm Money is for.

Financial organisation checklist

Accounts

- ☐ List every bank account
- ☐ List every credit card
- ☐ List every loan
- ☐ List every investment account
- ☐ List every retirement account

Documents

- ☐ Gather tax records
- ☐ Gather insurance policies
- ☐ Gather loan documents
- ☐ Gather property records
- ☐ Create digital storage folders

Bills

- ☐ Create recurring bill list
- ☐ Verify due dates
- ☐ Confirm payment methods
- ☐ Enable reminders

Financial snapshot

- ☐ Calculate net worth
- ☐ Calculate emergency fund balance
- ☐ Identify outstanding debts

Goals

- ☐ Define top financial priorities
- ☐ Set annual targets
- ☐ Schedule monthly reviews

Financial planning worksheet template

Use this simple worksheet once each month.

Category	Current status	Notes
Cash savings		
Emergency fund		
Debt balance		
Investments		
Retirement savings		
Upcoming expenses		
Financial priority #1		
Financial priority #2		
Next review date		

This worksheet provides a quick financial snapshot without becoming complicated.

The complete Calm Money guide

You've done the quick reset. Now build the full system.

The complete seven-chapter system for getting your full financial picture organised, automated, and calm.

→ 7 complete chapters · 10 fill-in worksheets → A full income, debt, and net worth snapshot → The 50/30/20 spending plan and three-account system
→ An automated savings and investing setup

Get the complete guide at:

northboundguide.com/calm-money-monthly-finance-system/

All characters in this guide are fictional. This guide is for information only.