

Personal Stewardship Checklist



"Know well the state of your flocks, and pay attention to your herds; for riches are not forever, nor does even the crown endure to all generations."
Proverbs 27:23-24

	YES	NO	IN PROCESS
I/We have a plan for how we spend our income; (expected and unexpected).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We understand and apply the concept of saving.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We understand and apply the concept of tithing.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We understand and apply the concept of investing.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We have reviewed/have adequate life insurance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We have reviewed/have adequate health insurance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We have reviewed/have adequate property insurance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We have prepared my/our estate planning.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If Married:

Each spouse knows and understands the family finances or knows who to resource in the event of illness or death.....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

We rely on each other for counsel, and then seek additional counsel for financial decisions.....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

For those with children:

I/We have formally chosen a guardian for minor children in the event of our death or incapacity.....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

I/We intentionally teach our children about good financial stewardship.....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Personal Stewardship Checklist



"Know well the state of your flocks, and pay attention to your herds; for riches are not forever, nor does even the crown endure to all generations."
Proverbs 27:23-24

	YES	NO	IN PROCESS
I/We have a plan for how we spend our income; (expected and unexpected).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We understand and apply the concept of saving.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We understand and apply the concept of tithing.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We understand and apply the concept of investing.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We have reviewed/have adequate life insurance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We have reviewed/have adequate health insurance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We have reviewed/have adequate property insurance.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I/We have prepared my/our estate planning.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If Married:

Each spouse knows and understands the family finances or knows who to resource in the event of illness or death.....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

We rely on each other for counsel, and then seek additional counsel for financial decisions.....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

For those with children:

I/We have formally chosen a guardian for minor children in the event of our death or incapacity.....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

I/We intentionally teach our children about good financial stewardship.....

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------