

Build Your Financial Defense Worksheet

Step 1: Calculate Your Emergency Fund

Monthly Living Expenses: \$_____

Target Savings (3-6 months of expenses): \$_____

Current Emergency Savings: \$_____

Amount Needed to Reach Target: \$_____

Plan to Save:

Month	Amount to Save	Total Savings

Step 2: Insurance Coverage Review

Insurance Type	Current Coverage? (Yes/No)	Policy Details	Gaps/Adjustments Needed

Step 3: Debt Repayment Plan

Build Your Financial Defense Worksheet

Debt Type	Balance	Interest Rate	Minimum Payment	Priority for Repayment

Action Plan

1. **Emergency Fund:** Save \$ _____ per month to reach your goal by _____.
2. **Insurance:** Contact an agent to adjust coverage or fill gaps by _____.
3. **Debt Management:** Pay off high-interest debt by _____.