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STAGE 3 — CHAPTER 1

Setting up your finance systems • Worksheet 2

Review your money history

Use this worksheet to identify the ways you have been supported with your finances in the past, what has worked well for you and what has not.

For this worksheet, you will need to refer to your **'financial skills profile'**, which you created in the previous worksheet.

STEP 1

In the table below, write down the items from your financial skills profile where you have circled that you need either 'some help' or 'a lot of help' **A**. Use additional paper if necessary.

STEP 2

Consider if there are any other aspects of your money management where you need or want support that are not specifically outlined in your financial skills profile. Add these to the table below. Use additional paper if necessary.

STEP 3

For each item, consider how things have been managed in the past. Write down:

- » what has worked well **B**
- » what has not worked well **C**

A <i>What I need support with</i>	B <i>What has worked well in the past</i>	C <i>What has not worked well in the past</i>

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<i>What I need support with</i>	<i>What has worked well in the past</i>	<i>What has not worked well in the past</i>

Once you have completed this worksheet, keep it on hand. You will use it when you get to the next worksheet: **Set up your financial systems**.

Sometimes working through these stages helps identify things you didn't think of before.

If completing this task helps you see something is missing from your previous worksheets, go back and update them now.