

## FJA PROGRESS REPORT

Please see the last page of this report for guidance notes for completing this report.

<b>Name:</b>	<b>Date:</b>
--------------	--------------

### OVERALL JOURNEY

Overall Progress	January to April (previous)	May to August (current)
Stage on the Money Journey		
Total Net Worth		
Financial Joy State		

### INCOME STATE

Income Progress	January to April (previous)	May to August (current)
Monthly Income		
Number of Income Streams		
Number of Income Generating Assets		

## INVESTMENTS

Use the [net worth calculator](#) for these numbers.

Investment progress	January to April (previous)	May to August (current)
Total Assets Value		
Total Liabilities Value		
Total Net Worth		

## SAVINGS

Savings Progress	January to April (previous)	May to August (current)
Emergency Savings Amount		
Total Other Savings		
No. of Months of Expenses Covered By Total Savings		
Current Savings Rate (%)		

## CAREER & BUSINESS JOURNEY

Work Progress	January to April (previous)	May to August (current)
Work Monthly Income		
Side Hustle/ Business Monthly Income		
Overall work happiness (0-10)		

## NEXT QUARTER GOALS

Write down your headline goals for the next 4 months. Ensure they are Specific, Measurable, Achievable, Realistic and Time bound (S.M.A.R.T):

Income Goal:

Savings Goal:

Net Worth Goal:

Personal Development Goal:

Community Networking Goal:

## HELP YOU NEED FROM FJA

How can the FJA community specifically help you to achieve your goals above?

Income Goal:

Savings Goal:

Net Worth Goal:

Personal Development Goal:

Community Networking Goal:

## WHAT TO DO NEXT

1. Create an FJA folder on your computer and **save a copy** of this report. You'll have one 3 times a year.
2. Discuss your progress and goals with your **Accountability Partner** when you next meet them.
3. Pick **one** of your areas of help needed, head over to the FJA community and ask the community for specific help around that goal. Over the next 4 months, seek help from the other areas of help that you have indicated.

## GUIDELINES TO COMPLETING YOUR FJA QUARTERLY PROGRESS REPORT

Please complete this report with your partner if you have one.

### FJA RESOURCE

**Stage on the Money Journey:** Please take the quiz and assess your stage.  
([click here to access the money journey quiz](#))

**Your Net Worth:** Calculate your net worth.  
([click here to access your net worth calculator](#))

**Financial Joy State:** Assess your financial joy state.  
([Click here to access your financial state](#))

### INCOME STATE

**Current Income:** What is your total monthly income?

**Current Number of Income Streams:** How many income streams do you have?

**Income Generating Assets:** How many assets currently generate you an income?

### INVESTMENTS

**Total Assets Value:** What is the sum of the value of all your assets?

**Total Amount of Money Invested:** How much money did you invest for each investment vehicle?

**Total Revenue Generated:** Enter the revenue generated per investment vehicle?

### SAVINGS

**Savings Rate:** % of Net Income that you save each month.

**No. of Months of Expenses Covered By Total Savings:** Total Savings / Total Monthly Expenses.

### CAREER JOURNEY

**Work Monthly Income:** How much money are you making monthly?

**Side Hustle/Business Monthly Income:** How much money are you making monthly from your side hustle/business?

**Work Happiness:** On a scale of 0 (deeply unhappy) to 10 (very happy), how happy are you with your work life?