



TOPIC 5 | MY HOT TOPICS

This is your opportunity to share those things that are “keeping me awake at night.” We refer to them as Hot Topics. Let’s discuss what you’ve shared below.

ACTIVITY. Please list your Hot Topics below:

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

BEFORE YOUR NEXT SESSION

1. Finish completing My Spouse’s Estate worksheet, if necessary.
2. Finish completing My Financial Snapshot worksheet, if necessary.
3. Review the next session – Get Organized.
4. Complete Exercise #1 (Your coach will assist you during the next session if you cannot complete it on your own).
5. Review the My Important Documents worksheet and complete the Activity.