

# Family Financial Task Cadence

## Weekly

Pay bills  
Update Cash flow tool

## Monthly

Audit monthly expenses together (without judgment) to see on/of track of estimated

Update any tracking reports on goals

Example - pay down debt, shortage, etc.

Update cash flow tool

## Quarterly

Review investment statements together

Update your balance sheet

Consider having your accountability check-ins on projects with your advisor

## Annually

Meet with your professional advisor to stay on track