Wealth Reflection Guide

April is Financial Literacy Month. Take this opportunity to think beyond the basics and reflect on what's working, what's shifted, and what deserves your attention as you head into Q2. When you're ready to turn reflection into action, share your answers with your OpenArc advisor, or reach out to info@openarccorporate.com to start the conversation.

Where do you want to be financially in 12 months?

Think beyond returns. Consider milestones, transitions, or decisions you're anticipating.

Has your life changed in ways your financial plan hasn't caught up to yet?

New relationships, new business ventures, inheritance, real estate...are these reflected in your strategy?

What's one financial decision you've been putting off?

Estate documents, a long-held position, a conversation with family...what keeps moving to the back burner?

What does "enough" look like for you?

Defining your finish line, whether it's freedom, legacy, or impact, is the foundation of a plan that actually fits.

This worksheet is for informational purposes only and does not constitute financial advice.