

THE FINANCIAL TRIAGE CARD

Not everything important is urgent. But everything important needs a plan.

A FINANCIAL SCORE TELLS YOU WHERE TO LOOK. TRIAGE TELLS YOU WHERE TO START.

01 TRIAGE YOUR FINANCIAL PRIORITIES

URGENCY OF ACTION - NOT FINANCIAL HEALTH

Identify your priorities. Choose one to act on. Revisit the others as priorities change.

1 What is the consequence of waiting?

2 Is there a deadline or dependency?

3 What is the next decision that needs to be made?

NOW

Material exposure, approaching deadline, or serious consequences of waiting.

Priority:

NEXT

Important, not urgent. Give it an owner and a scheduled date.

Priority:

LATER

A lower-priority improvement that can reasonably wait.

Priority:

02 CHOOSE YOUR PRIORITY

THE TASK IS NOT THE OUTCOME

MY HIGHEST-PRIORITY FINANCIAL ISSUE

MY DESIRED OUTCOME

What does solved actually look like for my family?

03 CHOOSE YOUR TREATMENT PATH

☐ DIY

DO IT YOURSELF

Handle the work independently.

☐ DWY

DONE WITH YOU

Get expert guidance and participate in implementation.

☐ DFY

DONE FOR YOU

Delegate appropriate work while retaining control of key decisions.

04 COMMIT TO ACTION

ONE NEXT ACTION

OWNER

DEADLINE

I don't have to solve everything today. I just need to make sure the right next thing gets handled.

KNOW WHAT NEEDS TO HAPPEN. WANT HELP GETTING IT HANDLED?

IM Wealth helps physician families turn financial priorities into coordinated action so they can spend less time managing money and more time enjoying life.

START WITH YOUR FINANCIAL DIAGNOSTIC > imwealth.com/diagnostic



SCAN TO START

