

TAKE CONTROL Rx

THE 10-MINUTE FINANCIAL X-RAY

See what's organized, what's missing, and what's still living in your head.

YOU CAN'T TREAT WHAT YOU CAN'T SEE.

Your financial life has probably accumulated over years - accounts, benefits, insurance, loans, estate documents, business interests, tax information, and professionals.

Take 10 minutes and scan the major areas below.

Don't solve anything yet. Just see it.



I KNOW IT

We know what we have and where to find it.



NEED TO FIND IT

We know it exists, but it's scattered or unclear.



ONLY ONE OF US KNOWS

Our household depends on one person knowing where this lives.

THE FINANCIAL X-RAY

SELECT ONE STATUS FOR EACH AREA

CASH + INCOME	I KNOW IT	NEED TO FIND IT	ONLY ONE KNOWS
Checking & savings accounts	☐	☐	☐
Emergency reserves	☐	☐	☐
Income sources / compensation	☐	☐	☐
Cash flow / spending system	☐	☐	☐

INVESTMENTS + RETIREMENT	I KNOW IT	NEED TO FIND IT	ONLY ONE KNOWS
Employer retirement plans	☐	☐	☐
IRAs / Roth IRAs	☐	☐	☐
Brokerage / investment accounts	☐	☐	☐
Old employer or residency accounts	☐	☐	☐
HSA / Health Savings Accounts	☐	☐	☐
Other employer benefits	☐	☐	☐

DEBT	I KNOW IT	NEED TO FIND IT	ONLY ONE KNOWS
Mortgage(s)	☐	☐	☐
Student loans	☐	☐	☐
Other significant debt	☐	☐	☐

PROPERTY + OTHER ASSETS	I KNOW IT	NEED TO FIND IT	ONLY ONE KNOWS
Primary residence / other real estate	☐	☐	☐
Rental / investment properties	☐	☐	☐
Other significant assets	☐	☐	☐

PROTECTION	I KNOW IT	NEED TO FIND IT	ONLY ONE KNOWS
Life insurance	☐	☐	☐
Disability insurance	☐	☐	☐
Employer-provided coverage	☐	☐	☐
Beneficiaries	☐	☐	☐

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CONTINUE THE X-RAY

The picture becomes useful when the whole household can see it.

ESTATE + FAMILY	I KNOW IT	NEED TO FIND IT	ONLY ONE KNOWS
Will / trust	☐	☐	☐
Powers of attorney	☐	☐	☐
Healthcare directives	☐	☐	☐
Guardians / important family instructions	☐	☐	☐
Beneficiaries on accounts + policies	☐	☐	☐

TAX + BUSINESS	I KNOW IT	NEED TO FIND IT	ONLY ONE KNOWS
Tax returns / tax strategy	☐	☐	☐
CPA / tax professional	☐	☐	☐
Practice ownership / partnership / equity	☐	☐	☐
Important business agreements, if applicable	☐	☐	☐

YOUR FINANCIAL TEAM	I KNOW WHO TO CALL	NEED TO FIND IT	ONLY ONE KNOWS
Financial advisor / wealth team	☐	☐	☐
CPA / tax team	☐	☐	☐
Estate attorney / legal team	☐	☐	☐
Insurance professional	☐	☐	☐

THE ONE-SPOUSE TEST

If you were unavailable tomorrow, could your spouse or partner locate the important information above, understand the plan, and know who to call - without asking you?

☐ **YES**
We both know where the important pieces live.

☐ **MOSTLY**
We'd figure it out, but there are gaps.

☐ **NO**
Too much still lives in one person's head.

WHAT DID YOUR X-RAY REVEAL?

The area that surprised me most:

The biggest source of fragmentation:

What my spouse would struggle most to find:

YOUR FIRST PRESCRIPTION

Don't organize everything today.

Choose the ONE gap that would create the most confusion or stress. Start there.

THIS WEEK, WE'RE GETTING THIS OUT OF OUR HEADS:

AND PUTTING IT HERE:

You can't treat what you can't see.

Your X-Ray shows you the picture. Now you can decide what deserves attention.

WANT A SECOND SET OF EYES ON YOUR X-RAY?

Seeing the whole picture is the first step. Knowing what deserves attention - and what does not - is where clarity begins.

The complimentary Physician Financial Wellness Diagnostic helps you identify the gaps and opportunities in your financial life and understand what to address first.

BOOK YOUR COMPLIMENTARY PHYSICIAN FINANCIAL WELLNESS DIAGNOSTIC

IMWEALTH.COM/DIAGNOSTIC

NO PRESSURE. NO PRODUCT PITCH. JUST A CLEARER PICTURE OF WHAT DESERVES ATTENTION NEXT.

