



Financial Planning Worksheet for Female Entrepreneurs

Section 1: Business Snapshot

Business name: _____

Monthly revenue: _____

Monthly expenses: _____

Profit margin: _____

Section 2: Pay Yourself

Your current pay structure:

☐ No structure

☐ Salary

☐ Owner draw

☐ Combination

Target monthly salary: _____

Section 3: Emergency Funds

Personal emergency fund

Goal: _____

Current: _____

Business emergency fund

Goal: _____

Current: _____

Section 4: Tax Preparation

Percentage to set aside for taxes: _____%

Quarterly taxes paid? ☐ Yes ☐ No

Section 5: Retirement Strategy

Which accounts do you have?

☐ SEP IRA

☐ Solo 401k

☐ Roth IRA

☐ Traditional IRA

☐ Brokerage account

Annual retirement savings goal: _____

Section 6: Protection Planning

Which protections do you have?

☐ Liability insurance

☐ Disability insurance

☐ Business interruption

☐ Proper entity structure

Gaps to address:

Section 7: Big Picture Goals

Where do you want your business to take you in the next 5 years?

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