

Financial Priority Matrix

NAME:

DATE:

1. IMPORTANT & URGENT

Eg: Household Expenses

2. IMPORTANT, NOT URGENT

Eg: Investing in Retirement Fund

3. NOT IMPORTANT & URGENT

Eg: Impulse purchase during sale

4. NOT IMPORTANT & NOT URGENT

Eg: Upgrading to an expensive phone

INSTRUCTIONS:

Quadrant 1 : Deal with immediate expenses and needs

Quadrant 2 : Plan for future wealth, secure your goals.

Quadrant 3 : Impulsive expenses for instant gratification

Quadrant 4 : Something that you want, but don't need