

Financial Checklist

These are all things that you should either have in place or at least have discussed with your spouse. For whichever items (that apply to your situation) you don't have in place, make a plan to get them done.

<u>Item</u>	<u>Action Needed</u>	<u>Action Date</u>
WRITTEN BUDGET	_____	_____
WILL/ESTATE PLAN	_____	_____
DEBT-ELIMINATION	_____	_____
EMERGENCY FUND	_____	_____
RETIREMENT	_____	_____
COLLEGE SAVING	_____	_____
CHARITABLE GIVING	_____	_____
HEALTH INSURANCE	_____	_____
LIFE INSURANCE	_____	_____
DISABILITY INSURANCE	_____	_____
AUTO/HOME INSURANCE	_____	_____
IDENTITY THEFT INSURANCE	_____	_____