

CHECKLIST

Components of a Healthy Financial Plan

	<u>Action Needed</u>	<u>Action Date</u>
Written Cash Flow Plan	_____	_____
Balance Sheet	_____	_____
List of Debts	_____	_____
Financial Goals	_____	_____
Goal Budget	_____	_____
Debt Reduction Plan	_____	_____
Monitor Credit Report 3X/Yr	_____	_____
Emergency Fund	_____	_____
Savings Strategies to Implement	_____	_____
Insurance		
Life	_____	_____
Disability	_____	_____
Health	_____	_____
Homeowner's/Renter's	_____	_____
Long Term Care	_____	_____
Retirement Plan		
Estimate Need	_____	_____
Identify Resources	_____	_____
Set Investment Target	_____	_____
Savings Plan	_____	_____
Investment Plan	_____	_____
Distributions Plan	_____	_____
Estate Plan		
Will(s)	_____	_____
Power of Attorney (POA)	_____	_____
Healthcare Proxy	_____	_____
List of Accounts and Policies	_____	_____
Review Beneficiary Desig.	_____	_____
Life Insurance	_____	_____
IRAs	_____	_____
Giving Plan (Annually)	_____	_____
Research Charities	_____	_____
Teach My Children	_____	_____