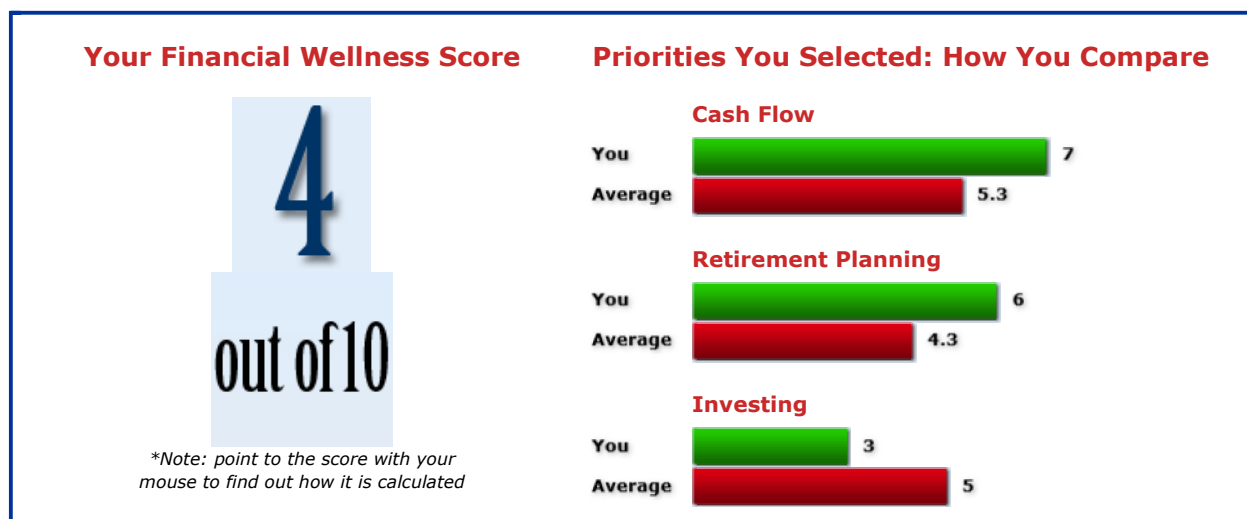




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Your Financial Wellness Assessment



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Key Vulnerabilities

The biggest risks you face are:

click on each item to see more details

1. Not having enough savings to cover emergencies.

You are currently in a position that could jeopardize your future goals or impact your ability to pay regular expenses if you face an emergency. Most financial planners recommend building a savings cushion of at least 3 to 6 months of your expenses to avoid a situation like this.

2. Not saving enough for retirement.

Your retirement is at risk. You may be in danger of falling short of your basic income needs in retirement.

3. Your family or loved ones' financial security is at risk should something happen to you.

The people you care most about are in jeopardy of facing a severe financial hardship should you pass away unexpectedly.

Next Steps

Building An Emergency Fund

click on each step to see additional resources

1. Find room in your monthly budget to set aside for saving and building your emergency fund.[set reminder](#)

-  [\(Mostly\) Painless Ways to Save Money](#)

2. Contribute regularly to your emergency fund by making an automated deposit every month towards a separate savings account. [set reminder](#)

-  [Saving for Goals Calculator](#)

Retirement Planning

click on each step to see additional resources

1. Run an estimate of your projected income replacement in retirement, with a goal of replacing at least 80% in order to maintain your standard of living. [set reminder](#)

-  [Retirement Estimator Calculator](#)

2. If necessary, make plans to increase your retirement plan participation by at least 1% every year (subject to IRS limitations). [set reminder](#)

Most financial planners recommend you contribute at least 10% of your salary to reach your retirement goals.

-  [5 Steps to Retirement Planning](#)
-  [IRS 401\(k\) Resource Guide - Limitation on Elective Deferrals](#)

Life Insurance

click on each step to see additional resources

1. Calculate how much coverage your family needs in order to replace your income. [set reminder](#)

-  [Life Insurance Needs Worksheet](#)

2. If you need more insurance, check with your payroll department to determine if you are eligible to add supplemental coverage through a group issued life insurance policy. [set reminder](#)

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