



## Life Event Planning Checklist

### **New Graduates**

- Create Post College Budget
- Review Cash Flow and Emergency Fund
- Review What Benefits Your New Job Offers / Review 401(k)
- Create a Realistic Savings Plan to Start Investing Consistently
- Set Up Monthly Investing Plan
- Create Short and Long-Term Goals
- Open Roth IRA
- Review Your Credit Score
- Review Student Debt and Options for Repayment
- Review all of these items with your financial advisor

