

Financial Wellness Checklist

If you would like more information on a topic, please mark it off below

RETIREMENT PLANNING

- How much money do I need in order to reach my retirement goal?
- Am I saving enough money to reach my retirement goal?
- What happens to my retirement plan if I change jobs?
- What do I do with my retirement plan from my previous employer?

EDUCATION FUNDING

- When can I start saving for my children's education?
- When should I start planning?
- What are my education savings options?

DISABILITY INCOME INSURANCE

- How much money does my family need if something happens to me?
- Do I need more Life Insurance other than what is offered by my employer?
- Do I have adequate income protection ?

FINANCIAL PLANNING

- Do I know what happens in my state if I pass away without a will?
- How do I protect my estate from taxes?
- How do I create a legacy for my loved ones?
- Am I charitably inclined?



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