

Financial To-Do List

This is a compiled list of some of the major things we believe you should be doing to ensure the financial health of you and your family. Especially if you are married, you and your spouse should take the time to sit down for a few minutes and discuss these major aspects of your life.

ITEM	Action Needed	Action Date
Written Budget	_____	_____
Will and/or Estate Plan	_____	_____
Debt-Reduction Plan	_____	_____
Tax-Reduction Plan	_____	_____
Emergency Funding	_____	_____
Retirement Funding	_____	_____
College Funding	_____	_____
Charitable Giving	_____	_____
Teach My Children	_____	_____
Life Insurance	_____	_____
Health Insurance	_____	_____
Disability Insurance	_____	_____
Auto Insurance	_____	_____
Homeowner's Insurance	_____	_____

I (We) _____, (a) responsible adult(s), do hereby promise to take the above-stated actions by the above stated dates to financially secure the well-being of my (our) family and myself (ourselves).

Signed: _____ Date: _____

Signed: _____ Date: _____