

Financial Checklist

- Sell items you no longer need
- Take a household inventory
- Discard old documents
- Sign up for paperless statements and billing
- Review spending, eliminate unnecessary expenses
- Review emergency fund, make plan to restock if needed
- Check credit score, address any problems
- Review debt, reduce interest rates where possible
- Review savings plan, increase contributions where able
- Review investments, rebalance as needed
- Review insurance plans, limits and deductibles, adjust as needed
- Review beneficiaries, make any necessary changes
- Adjust tax withholdings as needed

