

10-Step Financial Wellness Checklist ✓ one and write notes to side, if applicable

	Am I maximizing my employer matching contribution?					
	Yes	No	Not Sure			
2	Have I considered whether tax-deductible or Roth contributions are the best for me?					
	Yes	No	Not Sure			
3	Do I keep approximately 2-3 pay periods worth of income in my checking account?					
	Yes	No	Not Sure			
4	Do I have at least 6-8 months of expenses in a FDIC-insured high-yield savings account?					
	Yes	No	Not Sure			
5	If I have children, have I started a child's college savings fund?					
	Yes	No	Not Sure	N/A	_	
6	If I have dependents or loved ones to care for, do I have a life insurance policy?					
	Yes	No	Not Sure	N/A	_	
7	Check if I have any of these outstanding debts and the number of open accounts (e.g. \checkmark , 2)					
	College	Mortgage _	Credit Car	d(s)	Other	
8	If I have achieved the above, have I considered contributing more to my retirement?					
	Yes	No	Not Sure			
9	When was the last time I checked my Social Security benefit report on SSA.GOV?					
	Date		_			
10	Have I considered engaging an estate attorney to draft a will and/or trust?					
	Yes	No	Not Sure			

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