

## 10-Step Financial Wellness Checklist

✓ one and write notes to side, if applicable

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