

Financial Planning Week Checklist

- Balance your checkbook
- Make a monetary contribution to your favorite charity
- Start a savings account for a child, vacation or gift for yourself
- Help teach your children how to save and spend wisely
- Get your estate in order: Create or revise your will and other estate-planning documents
- Call your financial planner and share your appreciation for their service
- Pay off a credit card
- Get a head start on college – investigate college planning options
- Establish an emergency fund
- Evaluate your employee benefits and begin planning for open enrollment
- Develop your holiday spending budget
- Plan for year-end tax strategies
- Purchase a session with a financial planner for a relative, friend or colleague
- Give a relative, friend or colleague a subscription to a personal finance magazine
- Invite a financial planner to speak at your workplace
- Review your insurance coverage
- Write down your financial goals and revisit them periodically
- Start using personal finance software to help you better understand your money
- Look up three financial terms that have baffled you and resolve to understand them
- Talk to a relative about their plans for long-term care



Imagine Life ... Prepared

Share the gift of a financial review with friends and family
(a \$500 value) ... for free!

Text **PROMARK** to **67777**
or scan this barcode

