

Personal Finance Checklist

This checklist helps you identify personal finance areas that are in need of improvement. The checklist is only a means to assist you in thinking about areas that may need attention. The "Comments" column is provided so that you can specify actions to be taken in those deficient areas.

Name _____

Date _____

	Y	N	Comments
Monthly Income and Expenses			
1. Do you prepare a budget?	()	()	_____
2. Have you prioritized financial goals?	()	()	_____
Retirement			
1. Are you saving for retirement?	()	()	_____
Children's Education			
1. Have you planned for this expense?	()	()	_____
2. Does ownership of your education investments help reduce taxes?	()	()	_____
Your Investments			
1. Are they well diversified?	()	()	_____
2. Are you satisfied with performance?	()	()	_____
Risk and Insurance			
1. Will it cover your family needs?	()	()	_____
In the event of death?	()	()	_____
In the event of disability?	()	()	_____
2. Have an umbrella liability policy?	()	()	_____
Estate Planning			
1. Do you have a will?	()	()	_____
2. If you have a will, is it current?	()	()	_____
3. Does estate have adequate liquidity?	()	()	_____

Additional Comments:

Material provided by Michael P. Griffin.