



MAJOR COMPONENTS

of a Healthy Financial Plan

Your financial plan has a lot of moving parts.

So you have to know what you need to do and when you need to do it. This form shows you the essential things that absolutely must be part of any successful plan. Go line by line and note what action you need to take for each item, then put a deadline on it.

| ITEM | ACTION NEEDED | ACTION DATE |
|--------------------------|---------------|-------------|
| Written Cash Flow Plan | | |
| Will or Estate Plan | | |
| Debt Reduction Plan | | |
| Tax Reduction Plan | | |
| Emergency Funding | | |
| Retirement Funding | | |
| College Funding | | |
| Charitable Giving | | |
| Teach My Children | | |
| Life Insurance | | |
| Health Insurance | | |
| Disability Insurance | | |
| Auto Insurance | | |
| Homeowner's Insurance | | |
| Renter's Insurance | | |
| Long-Term Care Insurance | | |
| Identity Theft Insurance | | |