
FINANCIAL CHECKUP CHECKLIST

Please take a few minutes to complete this checklist. Any “no” or “not sure” answers can point to potential problems that we may be able to help you resolve.

	Yes	No	Not Sure
Monthly Income and Expenses:			
1. Do you use a budget?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have any financial problems that require immediate attention?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirement:			
1. Are you saving for retirement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you know what rate of return you need to maintain your lifestyle and keep ahead of inflation and taxes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children’s Education:			
1. Have you planned for this expense?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is the ownership of your education savings designed to reduce taxes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Investments:			
1. Are they well diversified?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Are you satisfied with their performance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk and Insurance:			
1. Will your insurance cover your family’s needs in the event of death or disability?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have an umbrella liability policy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Estate Planning:			
1. Are your wills current?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is your estate designed to minimize taxes and fees?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional Comments: _____
