



FINANCIAL HEALTH CHECKLIST

MONTHLY BUDGET

TAKE CARE OF DEBTS
(if applicable)

ESTATE PLANNING

- Living Trust
- Will
- Health Care Directive
- Power of Attorney
 - Medical POA
 - Financial POA

LIFE INSURANCE
(if applicable)

HEALTH INSURANCE

THERAPY/COUNSELORS

“When money changes, life changes,
when life changes, money changes.”
–Susan Bradley

**PROPERTY & CASUALTY
INSURANCE**
(if applicable)

INVESTMENT ACCOUNTS

- Retirement Savings
 - 401(k)
 - IRA, Roth IRA
- Emergency Funds *(savings)*
- Liquid/Accessible