



## Annual Finance Checklist

- Create/Update Your Monthly Budget
- Build an Emergency Fund
- Conduct Tax Review
- Manage Your Debt
- Update 401k/IRA Contributions
- Check Your Credit Report
- Review Your Insurance Coverages
- Review Your Retirement Asset Allocations
- Update Financial Goals
- Review Estate Planning
- Conduct Your Annual Mortgage Review
- Consult Your Financial Adviser (if applicable)



**Adam Coleman, CDLP®**  
Branch Manager / Senior Mortgage Planner  
704-733-7424  
adam@loanpronto.com  
adamcolemansomortgage.com  
NMLS# 181698



Scan me with your  
phone for website

