

## Giving Jobs to Dollars

	Your Vitals			Priority	Action Item
How do you use debt? Is your debt-to-income ratio $\leq 0.36$ ?	Yes	No	N/A		Yes
Have you planned for financial emergencies? ( $\Rightarrow$ 1 month?)	Yes	No	N/A		Yes
Do you have a monthly budget, use it and check it?	Yes	No	N/A		Yes
Do you check your credit report once a year?	Yes	No	N/A		Yes

Notes: \_\_\_\_\_

## Health Care Cost Containment Planning

	Your Vitals			Priority	Action Item
Do you have group or individual health insurance?	Yes	No	N/A		Yes
Do you know how to keep your health care costs low?	Yes	No	N/A		Yes

Notes: \_\_\_\_\_

## Retirement & Investment Planning

	Your Vitals			Priority	Action Item
Do you know how much you need to save to retire?	Yes	No	N/A		Yes
Do you know your investment asset allocation?	Yes	No	N/A		Yes
Do you know your performance and use a yardstick?	Yes	No	N/A		Yes
Do you know the total costs of your investments?	Yes	No	N/A		Yes

Notes: \_\_\_\_\_

## Transferring Risk

	Your Vitals			Priority	Action Item
Do you have disability coverage if you can't work?	Yes	No	N/A		Yes
Do you have a long-term care/chronic illness plan?	Yes	No	N/A		Yes
Do you have enough life insurance coverage?	Yes	No	N/A		Yes

Notes: \_\_\_\_\_

## Legal Documents

	Your Vitals			Priority	Action Item
Do you have a will?	Yes	No	N/A		Yes
Do you have a Power of Attorney (POA) for finance?	Yes	No	N/A		Yes
Do you have POA for healthcare/or a living will?	Yes	No	N/A		Yes
Do you have a use for a trust?	Yes	No	N/A		Yes
Do you have a plan for your digital assets?	Yes	No	N/A		Yes

Notes: \_\_\_\_\_

## Your Top 3 Action Items

	Ready to Act?	
1. _____	Yes	Not Yet
2. _____	Yes	Not Yet
3. _____	Yes	Not Yet

QuickCheck™ is for informational purposes only, and does not represent legal, tax, investment, financial, or other advice. Nothing in QuickCheck™ constitutes a solicitation, recommendation or offer to buy or sell any security, financial product, or insurance. Nothing in QuickCheck™ constitutes a comprehensive or complete statement of the matters discussed or the law relating to the subject matter.