

Anne's Financial Answers

FINANCIAL FREEDOM CHECKLIST

- | | | | |
|--------------------------|------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | Written Cash Flow Plan | <input type="checkbox"/> | Teach Kids about Money |
| <input type="checkbox"/> | Will or Estate Plan | <input type="checkbox"/> | Life Insurance |
| <input type="checkbox"/> | Debt Pay Off Plan | <input type="checkbox"/> | Health Insurance |
| <input type="checkbox"/> | Tax Plan | <input type="checkbox"/> | Disability Insurance |
| <input type="checkbox"/> | Emergency Funding | <input type="checkbox"/> | Auto Insurance |
| <input type="checkbox"/> | Retirement Funding | <input type="checkbox"/> | Home / Renters Insurance |
| <input type="checkbox"/> | Vacation Funding | <input type="checkbox"/> | Long-Term Care Insurance |
| <input type="checkbox"/> | Charitable Giving | <input type="checkbox"/> | Identity Theft Insurance |

Notes

If this checklist is overwhelming, let's connect and get you organized. You deserve it.