



Financial Planning Checklist

	<u>Required Action</u>	<u>Completed</u>
Written S.M.A.R.T Goals	_____	_____
Written Cash Flow Plan	_____	_____
Charitable Giving	_____	_____
Emergency Funding	_____	_____
Will and/or Estate Plan	_____	_____
Debt Reduction Plan	_____	_____
Homeowners Insurance	_____	_____
Health Insurance	_____	_____
Life Insurance	_____	_____
Auto Insurance	_____	_____
Disability Insurance	_____	_____
Tax Reduction Plan	_____	_____
Retirement Funding	_____	_____
College Funding	_____	_____
Long Term Care Plan	_____	_____
Teach My Children	_____	_____