

► **Personal Financial Task Checklist**

Use this checklist to help you to begin to shape a new financial future. Set target dates and check off the items as you accomplish the tasks. Revisit the checklist periodically and monitor your progress. Add additional tasks that are important to you and your financial well being.

<i>Done</i>	<i>To Do</i>	<i>Task</i>	<i>Target Date</i>
		Develop a budget	
		Open a checking account	
		Open a savings account	
		Sign up for automatic payroll savings	
		Establish an emergency fund	
		Obtain and review a copy of your credit report	
		Reduce your debt by paying extra	
		Limit the use and number of credit cards	
		Educate yourself on retirement accounts	
		Explore investing in stocks and mutual funds	
		Check your insurance coverage	
		Update beneficiary designations and create a will	
Ongoing Tasks			
✓		<i>Make all payments on time.</i>	
✓		<i>Organize your financial records.</i>	
✓		<i>Maintain control of, and understand your personal finances.</i>	