

Financial Planning

Complete Financial Plan



	Complete	Key Items	Identified Gaps	When
1	<input type="checkbox"/>	Written Plans, Hopes, and Dreams		
2	<input type="checkbox"/>	Monthly Budget		
3	<input type="checkbox"/>	Giving		
4	<input type="checkbox"/>	Saving – Beginner Emergency Fund \$2,500 (Rung #2)		
	<input type="checkbox"/>	Saving – Complete Emergency Fund 3 Months Expenses (Rung #5)		
	<input type="checkbox"/>	Saving – Known Upcoming Expenses		
5	<input type="checkbox"/>	Investments – Retirement		
	<input type="checkbox"/>	Investments – College		
	<input type="checkbox"/>	Investments – Dreams		
6	<input type="checkbox"/>	Insurance – Home/Renter’s		
	<input type="checkbox"/>	Insurance - Automobile		
	<input type="checkbox"/>	Insurance – Health		
	<input type="checkbox"/>	Insurance – Disability		
	<input type="checkbox"/>	Insurance – Life		
7	<input type="checkbox"/>	Health Care Advance Directive - Living Will		
	<input type="checkbox"/>	Health Care Advance Directive - Surrogate Designation		
	<input type="checkbox"/>	Health Care Advance Directive - Anatomical Donation		
8	<input type="checkbox"/>	Durable Power of Attorney		
9	<input type="checkbox"/>	Written Will		
10	<input type="checkbox"/>	Net Worth Statement		
11	<input type="checkbox"/>	“Hand Off The Finances” Document		
12	<input type="checkbox"/>	Financial Mentors		