

Major Components

of a Healthy Financial Plan

Your financial plan has a lot of moving parts.

So you have to know what you need to do and when you need to do it. This form shows you the essential things that absolutely must be part of any successful plan. Go line by line and note what action you need to take for each item, then put a deadline on it.

ITEM	ACTION NEEDED	ACTION DATE
Written Cash Flow Plan		
Will or Estate Plan		
Debt Reduction Plan		
Tax Reduction Plan		
Emergency Funding		
Retirement Funding		
College Funding		
Charitable Giving		
Teach My Children		
Life Insurance		
Health Insurance		
Disability Insurance		
Auto Insurance		
Homeowner's Insurance		
Renter's Insurance		
Long-Term Care Insurance		
Identity Theft Insurance		