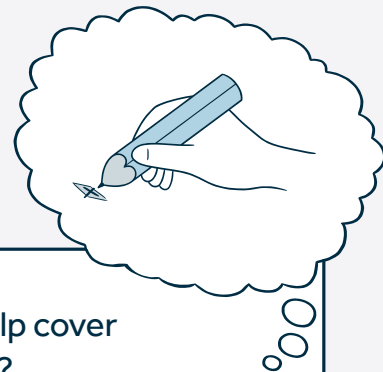


10 Financial Questions

to ask **yourself**

Check off each question after you've considered it to stay organized.



- ☐ If something unexpected happened to me, is a plan in place to help cover final expenses, such as funeral costs, medical bills or other debts?
- ☐ Do I have a plan if I'd like to leave an inheritance to my children or grandchildren?
- ☐ How would my family manage ongoing living expenses, such as mortgage/rent, groceries or transportation without my financial support?
- ☐ How am I monitoring whether my spending is exceeding my income?
- ☐ Are important, personal documents up to date, organized and accessible to a trusted family member/advisor?
- ☐ Does the insurance coverage I have in place – life, home/renters, car – still meet my needs?
- ☐ Could cutting back on discretionary expenses, such as pizza and a movie or subscriptions, allow me to contribute to other financial goals?
- ☐ Have I recently reviewed my beneficiary designations on financial accounts to confirm information is complete and up to date?
- ☐ Is a major life event on the horizon this year that will impact me financially, such as retiring, caring for an aging loved one, or moving?
- ☐ Have I reviewed my credit report within the past year?

