

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	_____	_____