



The Components of a Healthy Financial Plan

A brief look at what we all should do regardless of income

A lot of people discount the value of having a “A Financial Plan”. Regardless of your income level or your net worth, there are certain items that you need to address for a healthy financial future. This seminar will give you an introductory road map to give yourself a check up in this area.

Topics Covered will include:

	<u>Y/N/NA</u>	<u>Action</u>
• WRITTEN Cash Flow Plan – The “B” Word	_____	_____
• Emergency Fund	_____	_____
• Debt Reduction Plan	_____	_____
• Tax Reduction Plan	_____	_____
• Retirement Funding	_____	_____
• College Funding	_____	_____
• Charitable Giving	_____	_____
• Life Insurance	_____	_____
• Health Insurance	_____	_____
• Disability Insurance	_____	_____
• Auto Insurance	_____	_____
• Homeowner’s / Renter’s Insurance	_____	_____
• Will and/or Estate Plan	_____	_____
• Teaching my Children	_____	_____