



Your Own Financial Checklist

Did you know...?

Staying organized will actually help lower your cortisol levels—the body’s primary stress hormone.

(The New York Times)

Let's try to regulate that hormone as best as possible!

We hope you enjoy this extensive financial checklist that covers all aspects of your finances. Our goal is to help you to get organized so feel free to use this checklist however you'd like.*

Income

- Pay stubs

Debt

- Personal loan statements
- Credit card statements
- Mortgage statements
- Home equity line of credit statements

Insurance

- Home and auto
- Renter's
- Personal liability/Umbrella
- Disability
- Medical
- Life insurance
- Other types of insurance

Legal Documents

- Last will & testaments
- Trust
- Power of attorney

Savings

- Savings & checking accounts

Investments

- Retirement (401k, 403b, IRA, simple IRA, SEP IRA, etc.)
- Non-retirement (individual and joint brokerage accounts)

Tax Returns

- 2 most recent years

Employee Benefits Handbook

Social Security Statements

FOR BUSINESS OWNERS

- Insurance policies
- Tax returns
- Financial statements
- Business agreements



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