

Checklist: *The Early Investing Years*

(1st job & not yet starting a family)

Name: _____

SAVINGS	NOTES
Accumulation Planning Discussion	
Maximize Roth or Traditional IRA	
Retirement Plan Funding	
Retirement Plan Review	
Emergency Fund Discussion	
Asset Allocation Discussion	
Risk Tolerance Discussion	
RISK MANAGEMENT	
Life Insurance Policy Review	
AD&D Insurance Discussion	
Renter's Insurance	
Auto Insurance Review	
Health Insurance Review	
ESTATE	
Durable Power of Attorney Discussion	
Health Care Proxy/Living Will Discussion	
Annual Beneficiary Review	
BANKING	
Budget Discussion	
Cash Flow Discussion	
Annual Balance Sheet Review	



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	Credit Card Review	
	Student Loan Review	
	Auto Loan Review	
	Bank Review	
	SOCIAL SECURITY	
	Annual Statement Review	
	OTHER SUGGESTIONS	
	Vault	
	Organ Donation Discussion	
	Identity Theft Discussion	
	CPA Referral	
	Personal Insurance Referral	
	Own vs. Lease Automobile	
	Debt Reduction Strategies	
	Debt Reduction Strategies	



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