



Personal Check-up List

This worksheet is designed to help you complete your financial wellness check-up. Each item on this list is an important step of the process.

PAYCHECKS

- Gather your paycheck(s)
- Make sense of your deductions
- Complete the Paycheck Worksheet

FINANCIAL ACCOUNTS

- Gather your financial account information
- Complete the Financial Accounts Worksheet

CREDIT CARDS & LOANS

- Request your credit report
- Review your credit report for accuracy
- Make sense of the fine print
- Complete the Credit Card and Loan Inventory Worksheet

INSURANCE

- Gather your insurance policy information
- Brush up on insurance lingo
- Complete the Insurance Policy Worksheet

SPENDING

- Gather your bank and credit card statements
- Complete the Bills Chart
- Complete the Spending Worksheet

SAVING

- Gather your savings information
- Review your savings options
- Complete the Savings Worksheet

