Personal Financial Checkup Checklist

This worksheet is designed to help you complete the Personal Financial Checkup at www.cu.edu/employee-services/personal-financial-checkup. Each item on this list is an important step of the process.

PAYCHECKS

- [ ] Gather your paycheck(s)
- [ ] Make sense of your deductions
- [ ] Complete the Make Sense of Your Pay Worksheet

FINANCIAL ACCOUNTS

- [ ] Gather your financial account information
- [ ] Complete the Financial Accounts Inventory

CREDIT CARDS & LOANS

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

INSURANCE

- [ ] Gather your insurance policy information
- [ ] Brush up on insurance lingo
- [ ] Complete the Insurance Policies Inventory

SPENDING

- [ ] Gather your bank and credit card statements
- [ ] Complete the Make Sense of Your Bills Worksheet
- [ ] Complete the Make Sense of Your Spending Worksheet

SAVING

- [ ] Gather your savings information
- [ ] Review your savings options
- [ ] Complete the Set Goals for Savings Worksheet