# 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](http://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