

Annual financial checklist



TO DO

Done	Description
	Prepare your annual spending plan
	Create a file for your financial documents.
	Complete annual budget worksheet
	Review my Will
	Review my insurance policies
	Review my bank fees and charges
	Determine my debt position
	Review my savings plan
	Review my investments
	Retirement check
	File taxes
	Review your medial aid
	Consult with a CFP® professional
	Other:
	Other: