

# Assessing Your Financial Wellness Worksheet

\* Be sure to review upon major life events such as marriage, divorce, birth/adoption of a child, etc.

	<b>Up-to-Date</b> No Action Needed	<b>Review</b> Action May Be Needed	<b>Revise</b> Action Needed	<b>N/A</b> Not Applicable
State of the household finances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
'23/'24 retirement contributions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment portfolio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Get organized and file your taxes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Check your credit report	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Open a 529 for a child or grandchild	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insurance coverages*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Beneficiary designations*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charitable giving strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Estate plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>