



Financial Fitness Check List

Family Finances	Lifestyle Independence	Career Changes
<input type="checkbox"/> Budget/Cash flow management	<input type="checkbox"/> Paycheck Protection	<input type="checkbox"/> Job promotion
<input type="checkbox"/> Mortgage elimination strategies	<input type="checkbox"/> Senior Independence Planning	<input type="checkbox"/> Job loss
<input type="checkbox"/> Edu/Credit Card repayment strategies		<input type="checkbox"/> Job transfer
Retirement Investment Plan Review	Retirement Savings Plan Review	Tax Free Income Plans
<input type="checkbox"/> 401(k)	<input type="checkbox"/> Money Market Accounts	<input type="checkbox"/> Roth IRA
<input type="checkbox"/> Thrift Savings Plan	<input type="checkbox"/> Bank CDs	<input type="checkbox"/> Tax Exempt Muni's
<input type="checkbox"/> 403(b)	<input type="checkbox"/> Government Bonds	<input type="checkbox"/> Whole Life Insurance
<input type="checkbox"/> IRA/Variable Annuities	<input type="checkbox"/> Fixed Annuities	
<input type="checkbox"/> Stocks		
Home & Autos	Other	Business
<input type="checkbox"/> Purchase or sale of a home	<input type="checkbox"/> College Education Funding	<input type="checkbox"/> Executive Benefit Plans
<input type="checkbox"/> Purchase of a new car or SUV	<input type="checkbox"/> Planning for aging parents	<input type="checkbox"/> Employee Benefit Plans
	<input type="checkbox"/> Charitable giving	<input type="checkbox"/> SEP IRA
	<input type="checkbox"/> Marriage/Divorce	

Please coach me:

Name: _____

Personal Email: _____

Work phone: _____

Business Email: _____

Home phone: _____

Address: _____

Cell phone: _____
