



Spring-Cleaning for Your Finances Worksheet

Spring-cleaning isn't just for your home and garage. Spring-cleaning can be great for your finances, too.

By answering the following questions, you can increase your understanding of your financial situation and move forward toward your financial goals.

1. How can I enhance my current filing system for my financial documents?

2. Do I have adequate life insurance? How do I know?

3. Do I have an emergency fund and a plan for saving for it? If not, how can I get started on this process?

4. Do I have a will and an estate plan? If not, what do I need to do to create these? Where can I find a legal expert to help me?

5. Do I have a budget that fits my financial situation and supports my financial goals? If not, list monthly expenses here to get a quick idea of my budget needs.

6. Do I have disability insurance to pay my expenses if I become unable to work? How much do I need?

7. What is my investment plan? Do my investments have an appropriate amount of risk for my circumstances? Should I increase my diversification?
