

# FINANCIAL CHECK-UP CHECKLIST

- Identify your goals** - What are your short-term and long-term financial goals? Do you have a plan to achieve them?
- Discover your Money Personality** - Are your habits and attitudes around money getting in the way of your financial goals? Find out @ [callfederal.org/mpquiz](https://callfederal.org/mpquiz)
- Request and review your credit report** - Download for a free report at [annualcreditreport.com](https://annualcreditreport.com) and review it accuracy.
- Create a spending plan** - Review your income and expenses. Are your spending habits aligned with your goals? Are you spending more than you are making?
- Set savings goals** - Are you saving for periodic expenses? Do you have an emergency fund or other short-term savings? What is your retirement plan?
- Take inventory of your loans and credit cards** - What is the current balance, rate, and monthly payment for each? Could you save money by refinancing or consolidating?
- Invest in yourself** - Are there ways you can invest more in your future? Are you taking care of your physical and emotional health?
- Give back to your community** - Are there opportunities to strengthen your community to make it a better place to live, work, and play?

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TO HELP!**

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