

# Securing Your Financial Future Checklist

Task	Date Completed	Notes
1. Examine and Adjust Budget		
2. Set Savings Rules		
3. Build Emergency Fund		
4. Create a Debt Repayment Plan		
5. Review Insurance Policies		
6. Write or Update Your Will		
7. Consider Opening a Trust Fund		
8. Draft Advance Health Care Directive		
9. Establish Powers of Attorney		
10. Discuss Plans With Loved Ones		

