

**Financial Health – Check-Up**  
Are you financially well?

	<u>Yes</u>	<u>No</u>
1. <u>Estate Documents &amp; Considerations</u>		
• Do you have a will?	_____	_____
• Do you have a living will?	_____	_____
• Do you have a Medical Power of Attorney?	_____	_____
• Do you have a Durable General Power of Attorney?	_____	_____
• Have you named a guardian for your minor children?	_____	_____
• Have you prepared post-mortem instructions listing location of assets, important documents, etc.?	_____	_____
• Will there be enough funds set aside for funeral expenses?	_____	_____
2. <u>Insurance</u>		
• Do you have life insurance?	_____	_____
• Have you considered long-term care insurance?	_____	_____
• Have you considered disability insurance?	_____	_____
3. Do you have an up-to-date inventory of personal property?	_____	_____
4. Do you have an emergency fund for 3-6 months of expenses?	_____	_____
5. Do you check your credit report annually?	_____	_____
6. Do you have a plan for your children’s education?	_____	_____
7. <u>Retirement</u>		
• Are you investing the maximum amount allowable to a retirement plan?	_____	_____
• If no, are you investing any amount for retirement?	_____	_____
• Do you know your named beneficiaries for all retirement accounts?	_____	_____
8. <u>Business</u>		
• If you own a business, do you have a succession plan?	_____	_____
• In event of death, have you delegated a person to wrap-up the business affairs?	_____	_____