



JQ FINANCIAL

Financial Coaching

FINANCIAL WELLNESS CHECKLIST

It can be hard to keep track of everything there is to remember surrounding money. I created this list to help you make sure that nothing falls through the cracks! Everything on this list doesn't have to be done at once, but it is important to take time to look into each area. This will make sure that you have a well-rounded view of where your money stands. You can get control of your money! You are the boss of it, and I want you to succeed! Look me up on Instagram and Facebook where you will find videos to help you navigate each area.

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GETTING STARTED

- Develop a household budget
- Get the full total of all your debt
- Determine how much savings you will need
- Retirement contributions
- Think about other investment goals

ADDITIONAL ITEMS

- Tax withholdings
- Review beneficiaries
- Look into insurance costs (Auto, Home, Life)

LOOKING FORWARD

- Have you set up a Will?
 - Life Insurance
 - How much money do you want in retirement?
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