

Mid-Year Check-In

Budget

Are you sticking to your budget and making adjustments for when #lifehappens?

Life Insurance

Are you prepared in case of a tragedy?

Psst,
if you don't, the
courts will decide
for you! Yikes!



Debt Payoff

Are you tackling your outstanding debt?



Estate Planning

Do you have a plan for your home, car, art, and Star Wars figurines in the event of your passing.?

Insurance

Are your home and auto insurance plans the best fit?

College Savings

If you have children, are you contributing to their college savings?



Retirement

Are you contributing to a 401(k)?
#freemoney

Investments

Are you investing your side cash?



Income Taxes

How much are you withholding? (Should it be more? Less?)