

Find More Benjamins

Cash Reserves/Cash Accounts

- | | | |
|-------------------------|--------------------------|--------------------------|
| <i>Checking Account</i> | <input type="checkbox"/> | Overdraft Fees? |
| | <input type="checkbox"/> | Account Fees? |
| <i>Savings</i> | <input type="checkbox"/> | Interest rate |
| | <input type="checkbox"/> | Separate reserve account |
| | <input type="checkbox"/> | Money Market/CD? |

Debt

- | | | |
|---------------------|--------------------------|-----------------|
| <i>Strategy</i> | <input type="checkbox"/> | Credit score |
| <i>Credit Cards</i> | <input type="checkbox"/> | Payoff strategy |
| | <input type="checkbox"/> | Refinance |
| | <input type="checkbox"/> | Points/Offer |
| | <input type="checkbox"/> | Cut up? |

Paycheck/Payroll

- | | | |
|----------------------|--------------------------|---------------------------|
| <i>Self employed</i> | <input type="checkbox"/> | Set up payroll |
| | <input type="checkbox"/> | Company expenses/personal |
| <i>Employer</i> | <input type="checkbox"/> | Deductions |
| | <input type="checkbox"/> | Direct Deposit flow |
| | <input type="checkbox"/> | Insurances/Benefits |
| | <input type="checkbox"/> | H.S.A.? |
| | <input type="checkbox"/> | Flex Spending |
| | <input type="checkbox"/> | Stock Purchase |

Budget

- | | | |
|-----------------------|--------------------------|--------------------------|
| <i>Fixed Expenses</i> | <input type="checkbox"/> | Change withholding |
| | <input type="checkbox"/> | Track expenses |
| | <input type="checkbox"/> | Change utility plan |
| | <input type="checkbox"/> | Meal Plan |
| | <input type="checkbox"/> | Grocery budget |
| | <input type="checkbox"/> | Add technology |
| <i>Discretionary</i> | <input type="checkbox"/> | Use tracking systems |
| | <input type="checkbox"/> | Set entertainment budget |
| | <input type="checkbox"/> | Allowance system |
| | <input type="checkbox"/> | Vacation fund |

Insurances

Auto	<input type="checkbox"/>	Need
	<input type="checkbox"/>	Coverage Level
	<input type="checkbox"/>	Deductibles
	<input type="checkbox"/>	Add ons
Homeowners	<input type="checkbox"/>	Need
	<input type="checkbox"/>	Coverage Level
	<input type="checkbox"/>	Deductibles
	<input type="checkbox"/>	Inventory
Renters	<input type="checkbox"/>	Need
	<input type="checkbox"/>	Coverage Level
	<input type="checkbox"/>	Deductible
	<input type="checkbox"/>	Inventory
Overall	<input type="checkbox"/>	Credit Union?
	<input type="checkbox"/>	Group Discounts?
	<input type="checkbox"/>	Break up?
	<input type="checkbox"/>	Quotes?
Life	<input type="checkbox"/>	Need
	<input type="checkbox"/>	Type
	<input type="checkbox"/>	Funding
	<input type="checkbox"/>	Comparison
Disability	<input type="checkbox"/>	Need
	<input type="checkbox"/>	Work Coverage
	<input type="checkbox"/>	Pre/After tax
	<input type="checkbox"/>	Caps
Long Term Care	<input type="checkbox"/>	Need

Estate Plan

Overall	<input type="checkbox"/>	Need
	<input type="checkbox"/>	Attorney meeting?
	<input type="checkbox"/>	Durable power
	<input type="checkbox"/>	Health Care
	<input type="checkbox"/>	Beneficiaries on everything