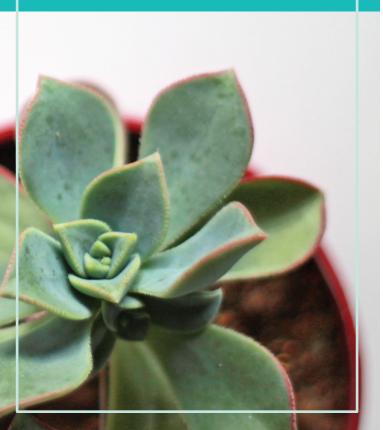


FINANCIAL LIFE CHECKLIST





SPRING CLEAN YOUR FINANCIAL LIFE CHECKLIST



Print your bank statement. Look at each transaction. Is everything accurate? Did you overspend?
Pull your credit report. Go to annualcreditreport.com to pull your report for free. Check and see if anything is on there that shouldn't be.
Create a Budget Binder. Get a 3 ring binder, put a copy your bills in there and write on the bill the date it was paid. Create a summary sheet (Word document) that has the bill, date due, and a place for you to write when the bill was paid. Put this in front of all your bills for each month.
Call your car insurance company. You may not be getting the lowest rate possible.
Create a budget. This is a great time to start if you aren't already doing this monthly.
Adjust taxes if you got a large refund. Talk with human resources to figure out the appropriate adjustment. A large refund means you overpaid on taxes, a.k.a. you gave the government an interest free loan. Not a good idea.
Set up an automatic withdrawal with your bank. Have at least 10% of your earnings deposited into a savings account every month.
Stop getting junk mail. Go to www.optoutprescreen.com. This will rid your home of clutter and unneeded credit card prequalifications and insurance documents.
Scan your tax returns and save to the cloud or on your Desktop. Then shred the physical copies.
Cancel unused subscriptions. Stop wasting money on unused subscriptions and make a huge list of all recurring subscriptions. Then one by one go through and cancel.
Set a financial goal that can be accomplished in 3 months. Then start to focus all your attention and energy into that one financial goal.
Inventory items being unused in your house and sell them online. Ebay, Craigslist, or used clothing resellers are a great option to use. List them all and start putting the extra money towards your financial goal.
Unsubscribe from emails that are tempting you to spend money. Use the free website, unroll.me to unsubscribe from 100s of emails in a couple of minutes. It's well worth using!
Invest in yourself. Learn how to manage your money and hire an accountability coach. Submit your application and work directly with me at whitneyhansen.com/customized-coaching

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