



FINANCIAL TAKE-OFF CHECKLIST

EMERGENCY FUND.....SET
BUDGET.....COMPLETE
JOB/INDUSTRY OUTLOOK.....EVALUATE
INCOME REDUNDANCY.....VERIFY
HIGH-INTEREST DEBT PAYOFF.....COMPLETE
GENERAL DEBT.....REVIEW
INVESTMENT GOALS.....REVIEW
TAX STRATEGY.....PLAN
INSURANCE.....CHECK
NET WORTH.....UPDATE
RELAX AND ENJOY.....INITIATE

CHECKLIST COMPLETE