



## Annual Financial Checklist

- Assess, review, & set goals:** Consider where you're at financially, where you'd like to be, and make a plan to get there. Need some help? [Check out this list](#) of New Year's resolutions for your finances.
- Maximize your paycheck:** Use the [free IRS Withholding calculator here](#) to make sure you're not having more taxes withheld than you're required to.
- Save on insurance:** Get quotes from multiple companies for your auto, home, life and other types of insurance each year to make sure you're getting the best deal. You can [find an independent insurance agent here](#) that can help you do this.
- Give yourself some credit:** By law, you have access to one free credit report annually from each of the 3 major credit bureaus [via this website](#). Check all 3 at least annually to make sure the information is accurate and report any errors to the respective credit bureau(s).
- Get a financial "check-up":** Just as you should see a doctor at least once a year to make sure you're in good physical health, you should also see a [fee-only financial advisor](#) *at least* once a year to make sure you're in good financial health. Schedule a complimentary introductory phone call with one today!

Schedule your  
phone call today!