

YOUR FINANCIAL HEALTH CHECKLIST

Use this checklist with your Personal Banker to identify what's important to you, where you are today, and what your next step might be.

Identify Your Next Financial Priority

☐ What are you working toward? _____

Save

- ☐ Build your first \$1,000 in savings
- ☐ Build an emergency fund of 3-6 months of household expenses
- ☐ Make saving automatic with direct deposit or recurring transfers
- ☐ Review whether your current savings, money market, or CD options fit your goals
- ☐ Identify additional short- and long-term savings goals _____

Borrow

- ☐ Review your current debt
- ☐ Identify any upcoming purchases or borrowing needs _____

Home

- ☐ Prepare for a future home purchase
- ☐ Plan for home improvements

Retirement

- ☐ Are you on track to meet your goal?
- ☐ Understand where you are today and where you want to be
- ☐ Identify questions or areas where additional retirement planning may help _____

Make Banking Work for You

- ☐ Review your Online and Mobile Banking setup
- ☐ Enroll in eStatements
- ☐ Set up Mobile Banking
- ☐ Set up account alerts
- ☐ Learn about fraud awareness and account protection
- ☐ Review beneficiary designations

Put Your Plan Into Action

- ☐ Review your banking relationship — Make sure your current accounts and services still fit your needs and explore other account options, promotions, or rates that may help you reach your goals.
- ☐ Identify your next steps — Decide what actions make sense for you today and what you may want to work toward in the future.

Follow Up

Follow up with your banker and keep making progress toward your financial goals.



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