

TODAYS DATE:

BIG PICTURE PLANNING

# Easy Money Checklist

1. EMERGENCY FUNDS

2. DEBT MANAGEMENT

3. SAVINGS

KIDS COLLEGE FUND?

4. RETIREMENT FUND

5. PAY HOUSE OFF

6. INVESTMENTS

7. FINANCE ADMIN

WILL

POA

DETAILS/ACCESS

8. MONEY GOALS

9. FINANCIAL SUPPORT

PLANNERS? BROKERS?