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Helping You Succeed

Personal Finance Checklist

- Conduct a review of all your finances and accounts
- Set your financial goals – short, intermediate and long term
- Create a budget and stick to it
- Open a savings account and start saving regularly
- Purchase insurance or shop for a better deal on current policies
- Pay down any existing debt
- Start investing to grow your future wealth
- Refinance debts to reduce your interest payments
- Use cashback sites to save money on your shopping
- Use rewards credit cards to earn on your spending
- Switch bank accounts to find a better deal
- Review spending and identify bills to cut
- Save for retirement using tax efficient IRAs and 401(K)s
- Estate planning
- Plan for your family's future such as college savings plans
- Check credit report and improve your credit score
- Fix credit report errors
- Build alternative sources of income
- Review finances annually and make adjustments
- Keep up to date with the financial news and keep learning.
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