

Personal Financial Checklist



Women account for 51% of the workforce, 85% of consumer spending and \$7 Trillion in investable assets, yet only 8% of investors. We retire with two-thirds the assets men do and are 80% more likely to be impoverished in retirement. We've got work to do.

- Inventory your assets and liabilities.
- Create a Financial Vision Statement that you review quarterly along with your net worth.
- Review budget, debt paydown and emergency savings.
- Plan for retirement.
- Audit your trust and insurance planning needs based on current lifestyle and future plans.
- Invest.

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