

Financial Legacy Check-in



This check-in is meant to help you take stock of where you are, what you are building, and what you want to protect as you plan for what comes next.

Check all that apply in each section, then write one realistic step you can take this month to continue to build on your financial legacy.

What I've Built So Far

- ☐ I have a steady source of income
- ☐ I have some savings, even if it is small
- ☐ I have paid down debt or avoided taking on new debt
- ☐ I own a home or plan to in the future
- ☐ I have workplace benefits or retirement accounts

What I Want to Protect

- ☐ My ability to cover basic expenses
- ☐ My family's financial stability
- ☐ My home or housing situation
- ☐ My savings and benefits
- ☐ The progress I have already made

What Could Create Financial Stress

- ☐ Changes in income or employment
- ☐ Housing costs or rent increases
- ☐ Medical or caregiving expenses
- ☐ Loss of benefits after military service
- ☐ Unexpected emergencies

Planning for What's Next

- ☐ I know which benefits or protections changed after service
- ☐ I have thought about my financial goals beyond today
- ☐ I know what questions I still need answered
- ☐ I am open to getting guidance or support

One Step I Can Take This Month

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