

14-Day Self Growth Challenge

WITH COACH MOLLY K

Day 13 - Checking in on Your Finances

Start a financial notebook. This can be a physical notebook or something digital using the Evernote or Mint apps. In this “notebook” include your end of year statements for all of your financial accounts (IRAs, banking accounts, insurance with cash value, stocks, etc.) Consider this as your “annual financial check-up.” Are you where you want to be? If you haven’t made any financial goals before, this will give you a great starting point. This gives you a snapshot of your financial assets and if you do this year after year, you can “see” your progress. It is also a great tool to help you put together a financial statement with ease.

Things to include in your financial notebook:

- Investment Account Statements
- Credit Score
- Insurance Statements
- Social Security Statements
- Retirement Account Statements
- Updated Family Budget
- Yearly Financial Statement (using the information from the above documents and find a form that works for you on-line or ask your local banker)

When can you get your notebook together?

Looking forward to growing with you!

- Molly K.

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