


# Taking Charge Checklist

As you gain a better understanding of your financial picture and with the right professionals supporting you, you can start to work through smaller details.

- Participate in Employer Retirement Plans up to the matched amount
- Review beneficiaries on life insurance and retirement plans
- Build a six-month emergency fund
- Check titling on all assets
- Shop Property & Casualty insurance
- Add an umbrella policy if you do not have one
- Locate life insurance policies and have them reviewed by a CFP®
- Locate legal documents.  
Update them if you have moved to another state since they were prepared or if more than 8-10 years old
- Plan for Long Term Care
- Have a CFP® analyze your investment accounts for risk vs. return, performance, cost, appropriate allocation, etc.
- Consider a home equity line of credit
- If you are paying more than 4% interest on debt, consider consolidation or refinancing

For more actionable advice, be sure to download our **Women & Money** guide!



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