

My Financial Wellness Action Plan

It's never too late to start



On a course for Financial Wellness

<u>Date to be Completed</u>	<u>Goal (pick one or two)</u>
_____	Keep a diary of my expenses for _____ week(s)
_____	Start or update a spending plan (budget)
_____	Find _____ new way(s) to save money, list them _____
_____	Review insurance for appropriate coverage and competitive rates (circle one or more) Automobile Insurance Homeowner's Insurance Tenants, Condominiums, and Mobile Homes Life Insurance Annuities Health Insurance: State of Wisconsin Group Health Insurance Program "It's Your Choice" -- open enrollment period in October Disability Income Insurance Medicare, Medicare Supplement, Medicare Select, Medicare Advantage, Medicare Cost, Medicare Part D, and Medicaid Worker's Compensation
_____	Check your credit report and correct errors if any
_____	Check my mortgage rate and determine if I should refinance
_____	Use Ballpark E\$timate calculator (retirement estimate tool) www.choosetosave.org/ballpark
_____	Department of Employee Trust Funds (ETF) http://etf.wi.gov
_____	Start or enhance my Deferred Compensation Call 1-877-457-9327 or visit wdc457.org
_____	Sign up for ETF E-mail Updates at http://etf.wi.gov
_____	Check out services offered by State of Wisconsin's LifeMatters® program at 1- 800-634-6433 or visit them online at http://mylifematters.com .
_____	_____ (add my own goal)