

My Financial Wellness Action Plan

It's never too late to start



On a course for Financial Wellness

Date to be
Completed

Goal (pick one or two)

- _____ 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)