Financial Organization Checklist

Create financial clarity before making the next decision.

Pillar: Manage

A Manage resource for organizing accounts, debts, documents, passwords, bills, and goals.

Action Checklist

- [ ] 1. List income sources and fixed expenses.
- [ ] 2. Gather account and debt information.
- [ ] 3. Store essential documents in one place.
- [ ] 4. Write down short-term and long-term goals.

Notes

Next Steps

Take the Legacy Ready Assessment. Explore Resources. Explore Financial Bliss Academy. Bring Legacy Ready to Your Organization.

Disclaimer

This resource is provided for general educational and informational purposes only. It does not constitute individualized financial, investment, insurance, tax, estate-planning, or legal advice. Financial and legal circumstances vary. Consult appropriately qualified professionals regarding decisions specific to your circumstances.