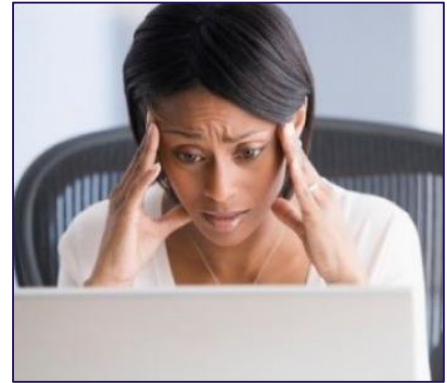


ARE MONEY MATTERS STRESSING YOU OUT?



We Have Tools to Help

FIND RESOURCES AT www.FoundationForFinancialPlanning.org

[Current Spending Plan](#)

[Future Spending Plan](#)

[Monthly Budget](#)

[Family Goals](#)

[Family Balance Sheet](#)

[Credit Card Payoff Calculator](#)

[Financial Prescription](#)

[What Makes Up Your Credit Score?](#)

[Finding the Right Bank](#)

[Saving Basics](#)

[Debt Management Worksheet](#)

[Social Security Contribution and Benefits](#)

[What is a 401\(k\)?](#)

[Advantages of a 401\(k\)](#)

[Roth vs. Traditional IRAs](#)

[College Cost and Earnings Return Projection](#)

[Selecting a Credit Card](#)

[Disaster Relief Information](#)



Our mission is to help people take control of their financial lives by connecting the financial planning community with people in need, supporting pro bono advice and outreach activities along the way. The Foundation for Financial Planning is a 501(c)(3) charitable organization.
www.FoundationForFinancialPlanning.org



GET TOOLS TO HELP YOU AT
www.FoundationForFinancialPlanning.org

THE FINANCIAL PLANNING PROCESS

Just as there are systematic steps for planning a task, there are systematic steps for planning your finances. It is not something you are born with; it's something you can train to do, and do well.

- DETERMINE YOUR GOALS
- GATHER INFORMATION
- ASSESS THE SITUATION
- CREATE AN ACTION PLAN
- EXECUTE THE PLAN
- MONITOR THE PLAN

A BASIC FINANCIAL PLANNING STARTER KIT

For nonprofit, noncommercial and free tools visit our website www.foundation-finplan.org/consumer-resource and look for [Navigating Your Financial Roadmap](#)

CREDIT

- Free credit report – www.annualcreditreport.com
- If there is a mistake on your credit report, go to all 3 reporting agencies
 - Equifax: (800) 685-1111
 - Experian: (800) 493-1058
 - TransUnion: (800) 916-8800
- Understanding credit scores – www.foundation-finplan.whatsmyscore.org
- Find a credit counselor – www.nfcc.org or call 1-800-388-2227

GET KEY ESTATE PLANNING DOCUMENTS

- Will** – make sure your wishes are honored when you are gone
- Financial Power of Attorney** – appoint someone to take care of your finances should you become incapacitated
- Living Will** – declare what lifesaving measures can be taken, should you be incapacitated
- Health Care Power of Attorney** – name a person to make medical decisions for you when you are unable to do so

QUICK CHECKLIST

- Max out your 401K at least to the point of getting the full employer match
- Consider a Roth IRA
- Make and/or update your will
- Check and update insurance and beneficiaries
- Review Social Security Statement

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