

End-of-Year Checklist



Use this checklist to review your yearly finances and plan ahead for the next 12 months. Mark off each item as you complete it, or draw a line through it if it doesn't apply to you. Then pat yourself on the back for starting the new year on the right foot!

INSURANCE HEALTH CHECK

- Check on your life insurance.
- Check on your auto insurance.
- Check on your home insurance.

REFINANCE AND EXTRA PAYMENTS

- Do a cash-out refinance of your home.
- Make an extra house payment.
- Make an extra car payment.

CHECK YOUR ACCOUNTS

- Contribute to your IRA.
- Contribute to your 401K.
- Check your FSA or HSA account.

OPEN NEW ACCOUNTS

- Open a CD.
- Open a high-yield savings account.
- Open a money market account.
