



Jamie M. Lima, MBA, CFP®
 Founder/President

1672 Main Street, Ste. E-155
 Ramona, CA 92065

Office: (760) 566-8533
 Direct/Text: (858) 923-4500
 Fax: (858) 800-4809

www.woodsonwm.com

Your Financial Planning Checklist

Write down your goals for your future lifestyle [1 year, 3 Year, 5 Year goals]		
How much money will you need to live the life you want in the future?		
Assess your financial income (revenue) and expenses and determine your residual income amount		
What expenses do you have in each category? [Fixed, Recurring, Non-Recurring, Emergency]		
List out your Assets and Liabilities		
Review any existing savings you have		
401K/403b		Savings Accounts
TSP Plans		Investments
Hard Assets – house(s), gold		Crypto – bitcoin, etc
What gets in the way of you saving?		
Set up your savings plan		
Review your Estate Plan and put these things in place:		
A Will		Power of Attorney
Durable Power of Attorney for Healthcare		Financial Documents for Joint Ownership
Durable Power of Attorney (Financial)		Living Trust
Determine what Life Insurance or other Insurance coverage you need and put that in place		