

## Love and Money Quick Start Sheet

### Money Goals:

| Description | Estimated Total \$ Needed | Estimated Time Period Needed |
|-------------|---------------------------|------------------------------|
|             |                           |                              |
|             |                           |                              |
|             |                           |                              |
|             |                           |                              |

### Day-to-day Financial Roles:

- \_\_\_\_\_ **Paying bills (insurance, housing, utilities, car note and credit card)**
- \_\_\_\_\_ **Monitoring accounts and tracking expenses**
- \_\_\_\_\_ **Making investment decisions**
- \_\_\_\_\_ **Filing paperwork**
- \_\_\_\_\_ **Preparing tax returns**
- \_\_\_\_\_ **Reviewing and selecting employer benefits**
- \_\_\_\_\_ **Periodically evaluating and shopping services providers (i.e. utilities and insurance)**
- \_\_\_\_\_ **Analyze progress towards goals**

**Periodic Check-ins:**

|                |  |
|----------------|--|
| <b>When:</b>   |  |
| <b>Where:</b>  |  |
| <b>Agenda:</b> |  |

|                |  |
|----------------|--|
| <b>When:</b>   |  |
| <b>Where:</b>  |  |
| <b>Agenda:</b> |  |

**Extra Credit**

**Documents to Gather:**

- Pay stubs
- Employer benefit statements
- Tax return(s)
- Credit report
- Property insurance policies (i.e. auto, home)
- Life insurance policies
- List of accounts (credit union, bank, investment, credit union, mortgage, etc.)
- All items above filed in a safe location we both know

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|                         |                                  |                       |
|-------------------------|----------------------------------|-----------------------|
| <b>Not NCUA Insured</b> | <b>No Credit Union Guarantee</b> | <b>May Lose Value</b> |
|-------------------------|----------------------------------|-----------------------|