# Annual Financial Checklist

Whether you're getting married, buying a house, having a baby, or want to retire early, use this annual financial checklist to help.

## January

- [ ] Set your financial goals.
- [ ] Set your career goals.

## Febuary

- [ ] Review your expenses.
- [ ] Review your credit report And credit score.

## March

- [ ] Take on a money-saving challenge.
- [ ] Review your banking and Investment fees.

## April

- [ ] Reevaluate your goals.
- [ ] Increase your savings rate.

## May

- [ ] Spend your tax rebate wisely (or don't spend it at all).
- [ ] Adjust your tax withholding.

## June

- [ ] Read a personal finance book.
- [ ] Do a mid-year clear-out.

## July

- [ ] Reevaluate your goals.
- [ ] Increase your savings rate.

## August

- [ ] Review your employee benefits.
- [ ] Shop for your insurance.

## September

- [ ] Evaluate your will and estate plan.
- [ ] Tackle another money challenge.

## October

- [ ] Reevaluate your goals.
- [ ] Increasing your savings rate.

## November

- [ ] Review your beneficiaries.
- [ ] Plan your health expenses.

## December

- [ ] Rebalance your portfolio.

- [ ] Give.