

# Yearly Money Checklist

☐ Set Goals

Amount to save:

\_\_\_\_\_

Debt to pay off:

\_\_\_\_\_

Personal goal:

\_\_\_\_\_

☐ Evaluate savings

Retirement:

\_\_\_\_\_

Emergency Fund:

\_\_\_\_\_

Other:

\_\_\_\_\_

☐ Evaluate debts

Total debt amount:

\_\_\_\_\_

☐ Get ready for taxes

☐ Find budget templates to use for the year

Year: