

Your quarterly financial checkup

Grab your account statements and other financial documents from the last three months, and let's get started.

Goals

List your top three financial goals (e.g., "Emergency fund"). Then note your progress toward each one.

	Goal name	Savings target	Total saved
Goal 1	_____	\$ _____	\$ _____
Goal 2	_____	\$ _____	\$ _____
Goal 3	_____	\$ _____	\$ _____

Retirement

What's the balance in your retirement account(s)?

IRA \$ _____ 401(k) \$ _____ Other \$ _____

Investments

If you have other investment accounts, list their values here.

\$ _____ \$ _____ \$ _____

Insurance

Review your insurance policies. If you've had life changes in the past quarter, are policy updates needed? Check "yes" if so or "no" if you're all set.

Home (or renter's) insurance yes no Car insurance yes no
 Health insurance yes no Life insurance yes no

Credit report

Review your credit report and make sure all personal and account information is correct and up to date and that you're aware of all debts. Note your credit score, too. Once that's complete, check this off.

Credit Score _____

Net worth

Plug your assets and debts into a net worth calculator. Jot down your net worth here. \$ _____

Notes

Write down anything else you're noticing in your financial checkup.

Nicely done! File this away and compare it to your next quarterly financial checkup to see how you're progressing. You can always refer to discover.com/financialcheckup for guidance.

Note: Non-deposit investment products are NOT FDIC insured. The information provided herein is for informational purposes only and is not intended as a substitute for professional advice.