

Family Financial Awareness Checklist

PROTECTING ASSETS • REDUCING RISK •
PRESERVING GENERATIONAL STABILITY



Financial literacy today creates freedom tomorrow.
Use this checklist to protect your family, your assets,
and your legacy for generations to come.



1. HOUSEHOLD AWARENESS

- ☐ I know exactly what comes into my household monthly
- ☐ I know exactly what leaves monthly
- ☐ I review my bank activity consistently
- ☐ I understand my debt obligations and interest rates
- ☐ I know what types of loans and credit cards I have
- ☐ I have a budget or spending plan that I follow



2. WORKPLACE BENEFITS AWARENESS

- ☐ I understand my workplace benefits
- ☐ I know whether my coverage ends if employment changes
- ☐ I understand the limitations of employer life insurance
- ☐ I know if I need additional personal coverage



3. PROTECTION & EMERGENCY PLANNING

- ☐ My family knows where important documents are located
- ☐ Beneficiaries are updated and aligned
- ☐ I have an emergency fund or plan in place
- ☐ Emergency contacts and financial instructions are organized



4. LEGACY & ASSET FLOW

- ☐ My family understands my wishes
- ☐ I have discussed asset distribution with appropriate people
- ☐ I understand how probate may affect my family
- ☐ I have a will or estate plan in place
- ☐ I am taking steps to reduce confusion and conflict
- ☐ I review my plan regularly



5. FAMILY EDUCATION

- ☐ My children are learning financial responsibility
- ☐ Important financial knowledge is being passed down
- ☐ We talk about money openly and often
- ☐ Our family is building systems, not just surviving month to month



Knowledge today. Protection today. Legacy forever.
Your family's future is built by the choices you make today.

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Protect. Educate. Empower. Preserve.