

Life Event Planning Checklist

New Graduates

- ✓ Create Post College Budget
- ✓ Review Cash Flow and Emergency Fund
- ✓ Review What Benefits Your New Job Offers / Review 401(k)
- ✓ Create a Realistic Savings Plan to Start Investing Consistently
- ✓ Set Up Monthly Investing Plan
- ✓ Create Short and Long-Term Goals
- ✓ Open a Roth IRA
- ✓ Review your Credit Score
- ✓ Review Student Debt and Options for Repayment
- ✓ Review all of these items with your financial advisor



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