MONEY 101 EDUCATION

10.95 MONEY AND LIFE CYCLES – ASSIGNMENT # 5 \_

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**ASSIGNMENT #5**

When you finish a Money 101 segment, there is usually a sigh of relief. Still, before moving on to other pursuits, I suggest you make a “TO DO” list of actions you will undertake to put yourself in a better financial position and get closer to your ultimate goals.

Thus, fill out the chart below, listing 3-5 actions you will take, and a realistic date by when you expect to finish the task*. Listing more than five items often is unrealistic – better to list five achievable items and get them done.* Place it somewhere annoying and visible – as a daily reminder.

The first is just given to you as an example.

|  |  |  |  |
| --- | --- | --- | --- |
|  | VERB | Item | Deadline |
| *Example* | *Get and Review* | *My full Credit report from https://www.annualcreditreport.com/index.action* | *4/20/xx* |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |

**HANDOUTS related to our last class and worth reviewing**

10.56 Will and Trust Planning Worksheet (complete BEFORE meeting with an attorney

10.55 Introduction to Estate Planning – Wills, Trusts, and Other Important Issues

10.61 What needs to be done when someone dies

**PLEASE STAY IN TOUCH - AND BOOK A FREE PRIVATE ONE-ON-ONE SESSION**

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