

# My Financial Wellness Action Plan

*It's never too late to start*



*On a course for Financial Wellness*

Date to be  
Completed

Goal (pick one or two)

- \_\_\_\_\_ Keep a diary of my expenses for \_\_\_\_\_ week(s)
- \_\_\_\_\_ Start or update a spending plan (budget)
- \_\_\_\_\_ Find \_\_\_\_\_ new way(s) to save money, list them \_\_\_\_\_
- \_\_\_\_\_ Review insurance for appropriate coverage and competitive rates (circle one or more)
- Automobile Insurance
  - Homeowner's Insurance
  - Tenants, Condominiums, and Mobile Homes
  - Life Insurance
  - Annuities
  - Health Insurance: State of Wisconsin Group Health Insurance Program  
"It's Your Choice" -- open enrollment period in October
  - Disability Income Insurance
  - Medicare, Medicare Supplement, Medicare Select, Medicare Advantage,  
Medicare Cost, Medicare Part D, and Medicaid
  - Worker's Compensation
- \_\_\_\_\_ Check your credit report and correct errors if any
- \_\_\_\_\_ Check my mortgage rate and determine if I should refinance
- \_\_\_\_\_ Use Ballpark E\$timate calculator (retirement estimate tool)  
[www.choosetosave.org/ballpark](http://www.choosetosave.org/ballpark)
- \_\_\_\_\_ Department of Employee Trust Funds (ETF) <http://etf.wi.gov>
- \_\_\_\_\_ Start or enhance my Deferred Compensation  
Call 1-877-457-9327 or visit [wdc457.org](http://wdc457.org)
- \_\_\_\_\_ Sign up for ETF E-mail Updates at <http://etf.wi.gov>
- \_\_\_\_\_ Check out services offered by the State Employee Assistance Program at  
[https://dpm.wi.gov/Pages/How\\_Do\\_I/ContactEap.aspx](https://dpm.wi.gov/Pages/How_Do_I/ContactEap.aspx).
- \_\_\_\_\_ \_\_\_\_\_ (add my own goal)