

DEPLOYMENT Financial Goals



Long Term Financial Success _____

Current Status

Yes No Unsure 1. I keep track of income and expenses with a written budget or spending plan.

Yes No Unsure 2. I save 10% of monthly income.

Yes No Unsure 3. I have adequate emergency savings.

Yes No Unsure 4. My monthly debt payments are less than 20% of my monthly income?

Yes No Unsure 5. I have adequate insurance coverage.

Yes No Unsure 6. I participate in a retirement plan.

Yes No Unsure 7. My will, power(s) of attorney, page 2 and SGLI beneficiary designations are up to date.

Yes No Unsure 8. I pay bills on time.

Yes No Unsure 9. I comparison shop and make planned consumer purchases.

Yes No Unsure 10. I generally do not worry about money.

Yes No Unsure 11. I have healthy, peaceful discussions about money with my family.

Yes No Unsure 12. I have written short and long term financial goals.

Deployment Financial Goal _____

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