



Mosaic

FINANCIAL CHECKLIST

	Yes	No	Maybe
INSURANCE			
Renters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Homeowners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Umbrella Policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pet Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ESTATE			
Will	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beneficiaries/Designations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Care Directives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guardianship Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCOUNTS			
Checking Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Savings Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brokerage Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
529 College Savings Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RETIREMENT ACCOUNTS			
Traditional IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SIMPLE IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roth IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEP IRA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thrift Savings Account (TSP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
403 (b)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
401 (k)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DEBT			
Credit Cards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Line of Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>