



TOPIC 1 | TAKING OWNERSHIP OF MY ASSETS

CHECK MY PROGRESS

Completed	Description	Reference
<input type="checkbox"/>	I understand how to update the title to my jointly owned home	Pg. 89
<input type="checkbox"/>	I understand how to update the title to my jointly owned auto and any other vehicles	Pg. 89-90
<input type="checkbox"/>	I understand how to update ownership to my jointly owned stock and bond certificates	Pg. 90
<input type="checkbox"/>	I understand how to update ownership to my jointly owned securities	Pg. 85-86, 90
<input type="checkbox"/>	I understand how to update ownership to my jointly owned U.S. Savings Bonds.	Pg. 91
<input type="checkbox"/>	I understand there may be digital assets of which to take ownership	Pg. 91



TOPIC 2 | UNDERSTANDING MY TAXES

CHECK MY PROGRESS

Completed	Description	Reference
<input type="checkbox"/>	I understand my filing status this year and following years	Pg. 93-97
<input type="checkbox"/>	I understand the taxes I must file and when I must file them	Pg. 96
<input type="checkbox"/>	I have adjusted my W-4 with my employer, if applicable	-



TOPIC 3 | UNDERSTANDING MY INSURANCE NEEDS

CHECK MY PROGRESS

Completed	Description	Reference
<input type="checkbox"/>	I have suitable healthcare insurance in place, or have a plan for obtaining suitable healthcare insurance	Pg. 100-102
<input type="checkbox"/>	I understand the benefits of long-term healthcare coverage	Pg. 102-103
<input type="checkbox"/>	I have removed my spouse from policies where necessary and have updated my life insurance beneficiary(ies)	Pg. 41, 102, 104
<input type="checkbox"/>	I have reviewed my life insurance policies if I have coverage, understand my coverage(s), and understand the benefits of a need analysis	Pg. 104-105
<input type="checkbox"/>	If I am employed, I understand my insurance benefits at work, including disability insurance	Pg. 105
<input type="checkbox"/>	I have suitable auto insurance in place	Pg. 106-107
<input type="checkbox"/>	I have suitable homeowner's or renter's insurance in place	Pg. 107-108
<input type="checkbox"/>	I understand the benefits of additional liability ("umbrella") coverage	Pg. 109



TOPIC 4 | PROTECTING MY ESTATE

CHECK MY PROGRESS

Completed	Description	Reference
<input type="checkbox"/>	I understand the importance of having a current will	Pg. 111-113
<input type="checkbox"/>	I understand a trust may be an option I want to review with an estate planning attorney	Pg. 113-114
<input type="checkbox"/>	I understand the importance of having a durable power-of-attorney	Pg. 114-116
<input type="checkbox"/>	I understand the importance of having advance directives	Pg. 116-117



TOPIC 5 | MANAGING MY HOUSEHOLD

CHECK MY PROGRESS

Completed	Description	Reference
<input type="checkbox"/>	I understand preventative maintenance for my home	Pg. 118
<input type="checkbox"/>	I can manage home repairs, or have someone in my life who can	Pg. 118
<input type="checkbox"/>	I understand preventative maintenance for my car	Pg. 118-119
<input type="checkbox"/>	I can winterize my home, or have someone in my life who can	Pg. 119
<input type="checkbox"/>	I understand how roadside assistance could be helpful	Pg. 120
<input type="checkbox"/>	I can manage my yard chores, or have someone in my life who can	Pg. 120
<input type="checkbox"/>	I understand how a home security system, like Ring or Arlo, could provide additional security	Pg. 121
<input type="checkbox"/>	I can back-up my computer and smartphone, or have someone in my life who can	Pg. 121