

FINANCIAL EMPOWERMENT CHECKLIST FOR WOMEN

Your Information:

Name _____
 Address _____ Telephone _____
 Email _____ Marital Status _____

KEY STEPS

1. Know Where You Stand

- Understand your current financial position: income, expenses, and net worth.
- Know your credit score and pull your credit report annually.
- List all debts: student loans, credit cards, auto loans

2. Build Financial Foundations

- Establish a dedicated savings account in your own name.
- Create a budget that aligns with your current life stage and goals.
- Build an emergency fund (3–6 months of essential expenses).

3. Protect What Matters

- Review insurance coverage: life, health, home, and disability.
- Review and update all beneficiaries on accounts and policies.

4. Plan For Growth

- Get clear on short-term and long-term financial goals.
- Understand your investments and know where your money is allocated.
- Evaluate your retirement savings strategy and contribution levels

5. Transition With Confidence

- If divorced or widowed, understand all settlement and support details.
- Meet with a Certified Divorce Financial Analyst® or financial planner

6. Secure Your Legacy

- Plan for your legacy: create or update your will and estate documents.
- Set financial boundaries in personal relationships—protect your independence.
- Educate yourself—take ownership of your financial knowledge

RISK TOLERANCE

What Is Your Risk Tolerance In Terms of Your Investments?

- Aggressive
- Moderate/ Aggressive
- Moderate
- Conservative/ Moderate
- Conservative

What Are Your Main Financial Goals or Priorities?

- Retirement
- Education
- Buying A Home
- Paying Down Debt
- Cash Flow Management
- Insurance
- Estate Planning
- Investment Planning
- Investment Management
- Other

Do you feel you are on track to reach these goals?

What current financial strategies are you using to reach your goals?



Book an Appointment: <https://calendly.com/gbrana>
Visit Our Website: <https://www.geetabrana.com/>
Email: GBrana@FCMAdvisor.com

Address: 960 Holmdel Road, Building 1, Second Floor, Suite 201, Holmdel NJ 07733
Tel Direct: 732-546-9315
Toll Free: 888-244-7131 Ext111

Securities and investment advisory services offered through Osaic Wealth, Inc. member FINRA/SIPC. Osaic Wealth is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic Wealth.