GEETA BRANA WEALTH
FINANCIAL SERVICES FOR WOMEN

FINANCIAL CLARITY CHECKLIST

For Women Navigating Divorce or Life Transition

PHASE 1: UNDERSTANDING WHERE YOU STAND

Gather Personal Financial Documents

- o Bank statements/checking savings, joint)
- o Credit card statements
- o Investment & brokerage account statements
- o Retirement plans (401k, IRA1 Roth IRA, pensions)
- o Pay stubs or income sources
- o Tax returns.(last 2-3 years)
- o Mortgage, Loan or debt documents
- o Insurance policies (life, health, auto, long-term care)
- o Social Security benefit statements (if any)

Track Your Monthly Cash Flow

- o Income
- o Bonuses or commissions
- o Child support /alimony
- o Rental or business income

Secure Emergency Funds

- o Secure Emergency Funds
- o Is the account in your name only?

Check Your Credit + Debt

- o Pull your credit report at **AnnualCreditReport.com**
- o Note your current credit score
- o List all debts: student loans, credit cards, auto loans

Build Your Professional Support Team

- o Certified Divorce Financial Analyst® (CDFA®)
- o Divorce attorney or mediator
- o Therapist or grief counselor
- o Estate attorney (wills/trusts)

"This is your reset - not your ending".
You deserve clarity, confidence and control

- Geeta Brana, CDFA®

CLARITY / CONFIDENCE / CONTROL

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