

NAME:

DATE:

# GRAD CHECKLIST

brought to you by Jordan Wealth Management

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## Budget

You've graduated and likely have your first PROFESSIONAL JOB! CONGRATULATIONS! Let's create a budget so you aren't living beyond your means. Budgeting also allows us to find opportunities for current income.

## Debt

Who knew that beautiful diploma would be delivered on a monster truck of loans!

Once we establish your budget, let's develop a plan to pay these loans down most efficiently.

## Savings

Pay Yourself First!  
A basic savings account should have six months of expenses.

After we achieve that goal we'll review saving up for other goals like buying your first home.

## Taxes

We partner with a local CPA who can assist you with planning strategies so you know what to expect for taxes and how to utilize tools to best plan for the future.

## Retirement

Review your employers retirement plan and decide what you can contribute.

Establish your own if your employer does not offer one.

## Manage Risk

Review protection strategies and your new employers benefit programs.

- Some topics include:
- Health, Life Disability
  - Auto, Renter, Homeowner

## Estate Plan

Regardless of your age or assets its important to understand the need for:

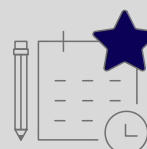
- Health Care Proxy
- Living Will
- Last Will & Testament

## Grow

Just because your formal education has ended does not mean you will not be learning more! Let's work together to direct your wealth for a purpose.

## Let's Chat!

Send us a message  
Meet us on Zoom  
Meet us in Person  
[go.oncehub.com/jordanwealthmanagement](https://go.oncehub.com/jordanwealthmanagement)



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