

Financial Planning Checklist

No matter where you fall financially, Caplo Advisory has the solutions. Add up your checked items and compare them with the recommendations provided below:

- 0-2 boxes: consult with a financial advisor to build your financial plan
- 3-4 boxes: visit our website for more information on the topics discussed
- 4-5 boxes: stay informed on the latest news by signing up for our newsletter



**Are You Using
The 50/30/20
Rule?**

Budgeting and Saving are the top concern for individuals and families. We have a couple of budgeting tricks up our sleeve for you.



**Life insurance:
Are You
protected?**

Have you looked into different life insurance policies? There is a life insurance policy for every situation.



**Prepared
For The
Unexpected?**

Emergency funds are not easy to build, however, assessing your finances is a great start to a plan.



**College
Saving Plans**

Did you know that you can help your child with college while investing in your future? Look into our creative planning recommendations.



**Ready To
Retire?**

Health and wealth are the focus of our retirement planning. Have you considered how you would like to retire?