

Checklist

	Goal/Attribute	Plan of Action	Check when complete
Communication	1. Dedicate a time to consider your finances/discuss with your partner		<input type="checkbox"/>
	2. List all outstanding loans/debts		<input type="checkbox"/>
	3. Set goals for the future (e.g., buy a home, have children, reskill, etc.)		<input type="checkbox"/>
	4. Set a monthly household budget		<input type="checkbox"/>
	5. Draft a will and power of attorney to protect your assets and fulfil your wishes in the worst-case scenario		<input type="checkbox"/>
Saving	6. Designate the purpose of and rules around joint and/or individual accounts		<input type="checkbox"/>
	7. Decide on an appropriate emergency fund (consider unexpected expenses that might arise if relocated or deployed)		<input type="checkbox"/>
Personal Investing	8. Decide whether you prefer to handle your own investments or consult a financial advisor		<input type="checkbox"/>
	9. How much risk are you willing to take on and can you afford those risks? (Are you willing to see your investment value decrease temporarily and still stick to the plan?)		<input type="checkbox"/>
	10. How will investment and other financial decisions be made if deployed overseas?		<input type="checkbox"/>
	11. Do you want to supplement your CAF Pension Plan through personal investing?		<input type="checkbox"/>
	12. Appoint a Trusted Contact Person and a beneficiary for each account		<input type="checkbox"/>