

2023 Financial Check Up

Member Checklist \$\$

Many times throughout the year we make promises to ourselves to do a better job with physical exercise or healthy eating. But, have you thought about taking steps to improve your financial health? Now is a great time to evaluate your financial situation, make note of areas for improvement and set some goals to shape up your finances. CODE Credit Union has many tools available for you to help you save money and spend it wisely. To get you started, we have some questions to identify areas that may need some attention:

	Circle One		
Are you having trouble keeping track of your finances?	Yes	No	Maybe
Do you have a budget?	Yes	No	Maybe
Do you have an Emergency Savings Account?	Yes	No	Maybe
Are you interested in other savings accounts:			
• Christmas Club	Yes	No	Maybe
• Vacation Club	Yes	No	Maybe
• Saving for a house or large purchase	Yes	No	Maybe
Are your accounts up to date in case of an emergency?	Yes	No	Maybe
• Make sure beneficiaries are correct and contact information			
What are your financial goals?			
• Save for something	Yes	No	Maybe
• Payoff debt	Yes	No	Maybe
• Idea: Make a goal for this time next year and track monthly			
Do you know your credit score?	Yes	No	Maybe
Are you paying too much for your car loan?	Yes	No	Maybe
Are you paying too much for your credit card or missing out on rewards?	Yes	No	Maybe
Would you like to buy a house and need help getting started?	Yes	No	Maybe
Do you feel weighed down by student loans?	Yes	No	Maybe
Do you have equity in your home that you'd like to use to:			
• Consolidate other debts	Yes	No	Maybe
• Make a large purchase	Yes	No	Maybe
• Do some home improvements	Yes	No	Maybe
• Pay for child's college	Yes	No	Maybe
Are you interested in refinancing your mortgage?	Yes	No	Maybe
Are you optimizing tax credits?	Yes	No	Maybe
• You may want to put additional \$ into IRA or HSA			
Are you interested in investing for the future?	Yes	No	Maybe

Office Use Only:

Member Name: _____

Member Number: _____

Teller: _____

FSR: _____