



WOMEN NAVIGATING FINANCES

Jump Start Financial Checklist

Ensure You Are on Course to Your Desired Financial Destination
Security, Freedom & Independence Can Be Yours!

- Have you updated EACH of your 401(k) beneficiary forms from your current 401(k) and prior jobs' 401(k) plans?
- Do you have an Umbrella Liability Policy in the minimum amount of \$5 million?
- Are your Auto Insurance's Uninsured/Underinsured Motorist coverage limits equal to your Personal Liability limits?
- Do you know what percentage of your current budget you'll want for your 'retirement' (or later) years?
- Do you carry disability insurance that will kick in after your resident state's insurance (if you have insurance through your state) runs out?
- Do you have a plan to cover your Long-Term Care expenses, and that of your partner if applicable, either through insurance or an asset depletion strategy?
- Are you withdrawing the LEAST expensive after-tax dollars during retirement to supplement Social Security and/or your pension(s)?
- Are any loans to your children or friends written down with a stated interest rate owed?
- Do you have a written will or trust to ensure your assets pass to your intended beneficiaries upon your death?
- Have you named guardians for any minor children or stepchildren?
- Do you know if you are on target, with at least a 90% statistical probability, to reach your short-term and long-term goals?



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- Are you confident you have both the right amount, and the right type, of life insurance?
- Have you named both a medical power of attorney AND a financial power of attorney? They probably won't be the same person.
- Are you confident your investments are optimally positioned to meet your goals?
- Has your CPA given you a money-saving idea in the last 2 years?
- Will your retirement plan still succeed if you become widowed or divorced?
- Have you written down two short-term goals, two mid-term goals and two long-term goals?
- Do you handle your own finances, or participate in the financial decisions of your household?

**Looking for guidance?
Confidential answers to your financial questions?**

>> [CLICK HERE](#) <<

**To Schedule Your Complimentary Consultation
with Debra L. Morrison, CFP®**

What Others Are Saying:

(Note: Initials provided to respect confidentiality.)

"I saved over \$2,000 on my homeowners insurance from just 1 tip from Debra." ~ W.C.

"Thanks to Debra educating me about refinances and mortgages, I save over \$10,000 in closing costs and potentially more than \$82,000 in extra interest I would have had to pay." ~ C.A.

"Having Debra's coaching prowess, honed over 42 years as a financial planner, is invaluable. I love being able to ask her questions about my specific situation." ~ T.C.



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About Debra L. Morrison, CFP®



Financial & Leadership Coach and Transformational Speaker leveraging 42 years as a CFP® and Asset Manager. Now retired from active financial planning, Debra's focus is speaking and coaching women, translating complicated financeze, one analogy at a time, boosting their self and financial confidence, and instilling We Can Do It Women™ strategies to be Intentionally Wealthy.

As seen on and in:



Note: Debra serves as your Financial Coach, Guiding Women Navigating Finances, NOT as your Financial Advisor. Women Navigating Finances is for women who want to maintain control of their course for financial security by knowing what to ask, whom to ask and how to make empowered decisions in alignment with their goals, lifestyle, and legacy.

More Praise for Debra

"Debra has helped me feel safe and secure with financial decisions I have made in a time when I really need to feel both safe and secure. I was hesitant to spend the money for the membership yet joining WNF has not cost me a single dollar as the information shared by Debra has saved me thousands of dollars already!" ~ R.S.

"Debra shares her extensive knowledge of finances, investments and planning in plain English terms that make it easy for me to not only understand, but to be able to take actionable steps from what she teaches. She guides you on how to pay yourself FIRST and how to not waste your money. She's great!" ~ C.T.

"I attended Debra's class and found it to be really, really informative and empowering. She didn't talk over my head, like my current financial planner does. I would recommend this to everybody. We all deserve to know the truths about money and Debra does just that! Thanks a lot!" ~ M.B.

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