Women & Money

ARE YOU REALY FOR CHANGE?

Brເ າງ... to you by [Insert CU name here]











OBJECTIVES

- Organize important papers
- Complete financial documents
- Tie up estate planning loose ands
- Review investment goals ask tolerance
- Developian formancial independence
- Identify reliable resources





FROM CHAOS TO CLARITY!



Women & Money 3: Are You Ready for Change?



WHAT TO KEEP?

Credit card receipts/statements
Retirement/savings statements

Credit union records

Insurance policies

Paycheck stubs

Military record

House records

Tax returns

Receipts

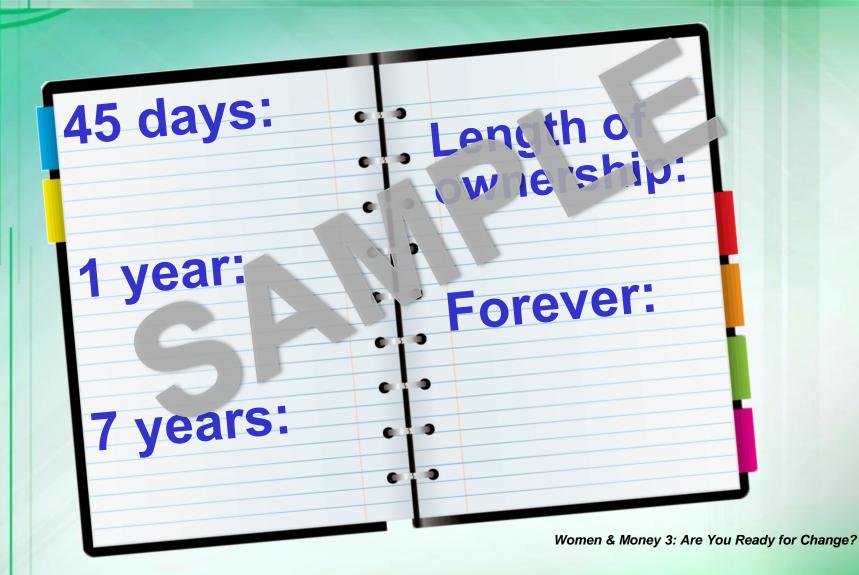
Bills

Miscellaneous





HOW LONG TO KEEP IT?





WHERE TO KEEP IT?







Active inactive files, per la lent records

or fireproof box





Electronic

- USB drive
- Encrypted external hard drive
- Scan to electronic form