

My overall financial/legal wellness goal is: _____

Recognizing that it may be easier to work on this goal one step at a time, my SPECIFIC PLAN for this week is to (select 1 or more options):

- Apply for financial aid or a scholarship/fellowship
- Schedule an appointment with a financial advisor
- Complete UF FLARE (Financial Literacy and Retirement Education) online modules [for faculty]
- Review my current health care benefits to prepare for open enrollment
- Review my retirement plan designations and beneficiaries
- Begin to pay down credit card debt
- Add additional money to my monthly mortgage payment
- Add [additional] money to my monthly retirement payroll deduction
- Explore pre-paid college plans and 529 savings plans for my child(ren)
- Look into debt consolidation/refinancing options for student loans
- Check my credit reports for errors
- Explore whether I qualify for loan repayment programs
- Review tax deductions for which I may qualify (e.g., health savings plan, child care savings plan)
- Create a will
- Review home/renters and auto insurance to determine if better rates are available
- Explore whether I need any additional insurance (e.g., umbrella, long-term care)
- Explore credit card benefits to determine if a different card would provide better rewards
- Make a copy of important financial/legal documents and put them in a safe place
- Change the passwords for my online accounts
- Other: _____

The 3 most important reasons I want to achieve my goal are:

- 1.
- 2.
- 3.

I have checked the UF Wellness Programs Resources tab to identify programs/services that may help me.

- Yes No

Some resources I have available to assist me with this goal (e.g., class, free program/service, supportive partner, health care professional, commercial product/service) are:

I will review my progress toward this goal on: ____ / ____ / _____ Signature: _____