

# Your quarterly financial checkup

Grab your account statements and other financial documents from the last three months, and let's get started.

## Goals

List your top three financial goals (e.g., "Emergency fund"). Then note your progress toward each one.

	Goal name	Savings target	Total saved
Goal 1	_____	\$ _____	\$ _____
Goal 2	_____	\$ _____	\$ _____
Goal 3	_____	\$ _____	\$ _____

## Retirement

What's the balance in your retirement account(s)?

IRA \$ \_\_\_\_\_ 401(k) \$ \_\_\_\_\_ Other \$ \_\_\_\_\_

## Investments

If you have other investment accounts, list their values here.

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

## Insurance

Review your insurance policies. If you've had life changes in the past quarter, are policy updates needed? Check "yes" if so or "no" if you're all set.

Home (or renter's) insurance  yes  no      Car insurance  yes  no  
 Health insurance  yes  no      Life insurance  yes  no

## Credit report

Review your credit report and make sure all personal and account information is correct and up to date and that you're aware of all debts. Note your credit score, too. Once that's complete, check this off.

Credit Score \_\_\_\_\_

## Net worth

Plug your assets and debts into a [net worth calculator](#). Jot down your net worth here. \$ \_\_\_\_\_

## Notes

Write down anything else you're noticing in your financial checkup.

Nicely done! File this away and compare it to your next quarterly financial checkup to see how you're progressing. You can always refer to [discover.com/financialcheckup](https://discover.com/financialcheckup) for guidance.

Note: Non-deposit investment products are NOT FDIC insured. The information provided herein is for informational purposes only and is not intended as a substitute for professional advice.