

FINANCIAL SPRING CLEANING TASKS

DECLUTTER YOUR FINANCIAL LIFE



- Consolidate accounts
- Go mobile/online

SAVE MONEY



- Review spending activity
- Quote insurance coverages
- Get the best loan and savings rates

PROTECT YOUR MONEY



- Update passwords, use MFA
- Turn on account alerts
- Freeze your credit report

ESTATE PLANNING



- Update/establish a will
- Power of attorney & medical directives
- Correct beneficiaries on life and retirement accounts