










My eLife Plan

eLife Plan Financial Checklist Expert Advice eLIFE PLAN HELP

Audio Coaching    [PRIORITIZE MY DREAMS NOW](#) [PRINT](#)

Category	More Info	Add Dream	Due	Complete
Career/Business	MORE INFO	ADD DREAM	Due	Complete
  Improve my sales and marketing skills			None	<input type="checkbox"/>
  Improve my time management skills			None	<input type="checkbox"/>
Education/Personal Development	MORE INFO	ADD DREAM	Due	Complete
  Prepare for next level of certification			None	<input type="checkbox"/>
Family/Relationships	MORE INFO	ADD DREAM	Due	Complete
  Call/write/email 2 of my nieces or nephews ea...			None	<input type="checkbox"/>
  Create family address book			None	<input type="checkbox"/>
Financial	MORE INFO	ADD DREAM	Due	Complete
  Become totally debt free			None	<input type="checkbox"/>
Health/Fitness	MORE INFO	ADD DREAM	Due	Complete
  Lose weight			None	<input type="checkbox"/>
Pleasure/Leisure	MORE INFO	ADD DREAM	Due	Complete
  Read a book a month			None	<input type="checkbox"/>
  Sew gifts for Christmas			None	<input type="checkbox"/>
Public/Community Service	MORE INFO	ADD DREAM	Due	Complete
  Volunteer one day a month this year			None	<input type="checkbox"/>
Spiritual	MORE INFO	ADD DREAM	Due	Complete
  Complete Bible Study			None	<input type="checkbox"/>
  Have a closer relationship with God			None	<input type="checkbox"/>
Other	MORE INFO	ADD DREAM	Due	Complete
  Re-landscape space beside garage			None	<input type="checkbox"/>

My Completed Dreams Page

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Completed Dreams and Goals by Categories PRINT

Congratulations! Below is a list of all of the Dreams and Goals you've completed! To move an item back to your eLife Plan uncheck the completed checkbox, however we recommend that you leave completed items as completed to build a list of all of your accomplishments. This will encourage you to take on new and exciting dreams and keep you motivated to succeed. **Note:** This Completed Dreams page only lists completed Goals once you've completed the Dream they are listed under. Until then they continue to stay inside your eLife Plan.

Career/Business	Completed
Start my own business	<input checked="" type="checkbox"/>
Education/Personal Development	Completed
Complete Coach Training	<input checked="" type="checkbox"/>
Get my Bachelor degree (4 yr.)	<input checked="" type="checkbox"/>
Get my Masters degree (post-graduate)	<input checked="" type="checkbox"/>
Family/Relationships	Completed
Plan 2006 Family Reunion	<input checked="" type="checkbox"/>
Develop a family tree diagram for our family	<input checked="" type="checkbox"/>
Financial	Completed
Pay my car loan off	<input checked="" type="checkbox"/>
Health/Fitness	Completed
Work with a personal trainer	<input checked="" type="checkbox"/>
Pleasure/Leisure	Completed
Take sewing lessons	<input checked="" type="checkbox"/>
Public/Community Service	Completed
Help Aunt set up family scholarship fund	<input checked="" type="checkbox"/>
Spiritual	Completed
Go on a short term missions project	<input checked="" type="checkbox"/>
Other	Completed
Remodel foyer	<input checked="" type="checkbox"/>

My Financial Life Checklist

eLife Plan **Financial Checklist** **Expert Advice** **eLIFE PLAN HELP**

Financial Life Checklist

PRINT

Dream: Complete My Financial Life Checklist

Purpose: To ensure I have a complete Financial Life Plan to achieve my dreams and goals.

Add Goals and Action Steps below to help you accomplish your dreams!

ADD GOAL

Goal: **Review/Create Financial Plan** **EDIT**

Steps Completed	Review Again	Set Reminder	Completed
<input type="text"/> 0%	None	Never	<input type="checkbox"/>

Action Steps:

Review/Create/Update budget and net worth stmt.	Due:	Set Reminder	Completed
	None	Never	<input type="checkbox"/>
Complete debt analysis and reduction strategy	Due:	Set Reminder	Completed
	None	Never	<input type="checkbox"/>
Review current assets and investments	Due:	Set Reminder	Completed
	None	Never	<input type="checkbox"/>
Review/Create/Update investment/savings plan	Due:	Set Reminder	Completed

My Financial Life Checklist

continued...

Set up emergency fund with 3 to 6 month's income	EDIT			
	Due:	Set Reminder	Completed	
	<u>None</u>	<u>Never</u>	<input type="checkbox"/>	
ADD ACTION STEP				
Goal: Review/Create Estate Plan	EDIT			
Steps Completed	Review Again	Set Reminder	Completed	
<input type="text"/> 0%	<u>None</u>	<u>Never</u>	<input type="checkbox"/>	
GET EXPERT ADVICE				
Action Steps:				
Review/Create/Update Will(s) and Trusts	EDIT			
	Due:	Set Reminder	Completed	
	<u>None</u>	<u>Never</u>	<input type="checkbox"/>	
Create/Review other Estate Planning documents	EDIT			
	Due:	Set Reminder	Completed	
	<u>None</u>	<u>Never</u>	<input type="checkbox"/>	
ADD ACTION STEP				
Goal: Review/Create Tax Plan	EDIT			
Steps Completed	Review Again	Set Reminder	Completed	
<input type="text"/> 0%	<u>None</u>	<u>Never</u>	<input type="checkbox"/>	
GET EXPERT ADVICE				
Action Steps:				
Complete tax savings analysis with accountant	EDIT			
	Due:	Set Reminder	Completed	
	<u>None</u>	<u>Never</u>	<input type="checkbox"/>	
Review/Create plan for organizing documents	EDIT			
	Due:	Set Reminder	Completed	
	<u>None</u>	<u>Never</u>	<input type="checkbox"/>	
Review/Create/Update Asset protection plan	EDIT			

My Financial Life Checklist

continued...

Goal: Review/Create Insurance Plan		EDIT	
Steps Completed	Review Again	Set Reminder	Completed
<input type="text"/> 0%	<u>None</u>	<u>Never</u>	<input type="checkbox"/>
GET EXPERT ADVICE			
Action Steps:			
Review/Update your personal insurance coverage (umbrella policy, auto, motorcycle, jewelry, boat, etc.)		EDIT	
	Due: <u>None</u>	Set Reminder <u>Never</u>	Completed <input type="checkbox"/>
Review/Update your homeowner's policy (premiums and coverage)		EDIT	
	Due: <u>None</u>	Set Reminder <u>Never</u>	Completed <input type="checkbox"/>
Review/Update flood and/or earthquake policy		EDIT	
	Due: <u>None</u>	Set Reminder <u>Never</u>	Completed <input type="checkbox"/>
Review/Update mortgage insurance needs		EDIT	
	Due: <u>None</u>	Set Reminder <u>Never</u>	Completed <input type="checkbox"/>
Review life insurance needs		EDIT	
	Due: <u>None</u>	Set Reminder <u>Never</u>	Completed <input type="checkbox"/>
Review disability insurance needs		EDIT	
	Due: <u>None</u>	Set Reminder <u>Never</u>	Completed <input type="checkbox"/>
Review long term care insurance needs		EDIT	
	Due: <u>None</u>	Set Reminder <u>Never</u>	Completed <input type="checkbox"/>
ADD ACTION STEP			

“Twenty years from now you will be more disappointed by the things that you didn’t do than by the ones you did do. So throw off the bowlines. Sail way from the safe harbor. Catch the trade winds in your sails.

Explore. Dream. Discover.”

-- Mark Twain