

FINANCIAL FUNDAMENTALS

Kiss My Assets



Budgeting

- Work sheets to help you itemize what you spend in order to develop a budget
- Net Worth work sheet

Education

- Money is no different than anything else you encounter in life. There are skills that need to be learned and some of them may only be learned by experience.

Resources

- Please go to our resource page for videos and calculators and other information tips on personal money management
- "If I only knew" This section highlights the little things in life that if you knew them ahead of time, would save you money and aggravation
- Other Peoples Mistakes – learning is often a result of making mistakes but why not let other people share their mistakes so you can learn from them.

Topics

- Married or Buried for less
- Horror of Debt
- Home Buying 101
- Credit wrecking Ball
- Living Beneath your means
- Budget or go Bust

Financial File Cabinet

- An easy way to be sure you have all the financial papers you need at your fingertips and if not how to acquire them

Estate Papers

- Will
- Living Will
- Health Care Surrogate
- Power of Attorney
- Living Trust

Insurance Papers

- Life
- Health
- Long Term Care
- Homeowners
- Car/Vehicles

Deeds

- Property A
- Property B
- Property C

Titles

- Vechilce title copies

Taxes

- Two years of returns

Pension Information

- Social Security statements and log in
- Work Pensions Plans
 - 401K
 - 403B
 - 457
 - Defined Benefit
- Personal Pensions
 - IRA
 - Roth IRA

Investment Statements

- Brokerage Account A
- Brokerage Account B
- Brokerage Account C
- Bank Accounts
- Bank CD's