

You are the CEO of Your Money, so it's time to take an active role in your finances. This checklist is made for you to celebrate the different ways you already are involved and ideas to get more involved! You are ready for this!

Active Role

- I started a money conversation.
- I started a money conversation with my partner.
- I started a money conversation with my family.
- I started a money conversation with my friends.
- I asked a question in The Pledgettes community.
- I started using a system or financial app to track my money.
- I started using a new financial app.
- I now know where my money is.
- I track my net worth.



Mindset

- I evolved my Money Mindset.
- I improved my relationship with money.
- I increased my confidence to make a money move.



Financial Literacy

- I attended a Personal Finance event (Pledgettes events count!)
- I read a financial book.
- I took an online course (Navigating Confident Money moves count!)



Goals

- I set financial goals.
- I achieved milestones toward my goal(s).
- I achieved (a) financial goal(s).



Financial A Team

- I added someone to my Financial A-Team.
- I removed someone from my Financial A-Team.
- I learned I needed a Financial A-Team.



Investing

- I opened a new retirement account.
- I increased my contribution to my retirement accounts.
- I maxed out an IRA.
- I maxed out my 401(k).
- I invested outside of my retirement accounts (crypto, peer-to-peer lending, invested in a business).



Real Estate

- I bought real estate.
- I sold real estate.
- I invested in real estate (REIT, co-bought, other).



Career

- I earned a new job.
- I earned a raise.
- I earned a bonus.



Launch

- I started a business.
- I started a side hustle.
- I started a new revenue stream in my business.
- I started a new revenue stream for my life.



Debt

- I accelerated my debt payments (credit card, student loan, car loan, mortgage).
- I paid off my student loans.
- I paid off my credit card debt.
- I paid off my car.
- I paid off other debt.



Future Planning

- I created an estate plan.
- I opened legacy accounts for others (kids, nieces/nephews, etc).

