



## Quick Start Financial Fitness Plan

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Name \_\_\_\_\_ Date \_\_\_\_\_

From \_\_\_\_\_ (Mo/Yr.) To \_\_\_\_\_ (Mo/Yr.)

### Priority areas I want to focus on for the next 12 months:

\_\_\_ Step 1: Create a monthly budget – the most essential step (see sample).  
Complete by \_\_\_\_\_

\_\_\_ Step 2: Build up an emergency fund (3-6 months essential expenses).  
Desired amount: \$ \_\_\_\_\_  
Complete by \_\_\_\_\_

\_\_\_ Step 3: Reduce or eliminate debt (handle credit responsibly).  
Action:

\_\_\_ Step 4: Invest and grow my savings.  
Action:

\_\_\_ Step 5: Use insurance to provide protection.  
Action:

\_\_\_ Step 6: Plan my retirement lifestyle (use a retirement calculator).  
Action:

\_\_\_ Step 7: Be grateful and give generously.  
Action:

### Questions? We are here to help!

Call our Member Contact Center at (877) 937-2328.



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