

NBT@Work®

Financial Health Check-up

Do you...	Yes	No
Spend less than you make (are saving)	<input type="checkbox"/>	<input type="checkbox"/>
Have an emergency fund that covers 3 - 6 months of living expenses	<input type="checkbox"/>	<input type="checkbox"/>
Have a banker to discuss your financial picture	<input type="checkbox"/>	<input type="checkbox"/>
Reduce/eliminate bad debt	<input type="checkbox"/>	<input type="checkbox"/>
Have disability insurance	<input type="checkbox"/>	<input type="checkbox"/>
Have enough life insurance to protect your family	<input type="checkbox"/>	<input type="checkbox"/>
Have an up-to-date will	<input type="checkbox"/>	<input type="checkbox"/>
Have an up-to-date Power of Attorney	<input type="checkbox"/>	<input type="checkbox"/>

MAIN POINTS FROM TODAY'S PRESENTATION

MY ACTION STEPS
