

✓ CHECKLIST

Take small steps today to potentially make big changes to your future.

Wondering where to start when it comes to budgeting, goal setting and money basics? Work through this checklist to get started and make a plan today.

YOUR MONEY **FUNDAMENTALS** CHECKLIST:

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| ✓ Get a Financial Wellness Checkup | ✓ Create a Spending Plan |
| ✓ Brush Up on Money Fundamentals | ✓ Get Help from Fidelity |
| ✓ Save for an Emergency Savings | ✓ Use Other Resources Available to You |

✓ Get a Financial Wellness Checkup

If you don't know where to start, begin with taking the financial wellness checklist to learn where you're doing well and where you could improve with your finances. Learn more in this [video](#) or go ahead and [take the checklist](#) now.

✓ Brush Up on Money Fundamentals

Now that you have an idea of where you are financially, let's brush up on money [fundamentals](#).

✓ Save for an Emergency Savings

Setting aside money for an unexpected expense means that you could be more prepared for an emergency. If you have a dedicated emergency savings fund, you could have the cash to pay for a new car battery or an emergency plumber, instead of charging it to a credit card or taking out a loan. Need more info? [Watch now](#). Then set up an [Emergency Savings account](#).

✓ Create a Spending Plan

Now that you've got an understanding of where you stand financially, what money fundamentals mean and what emergency savings are, let's take action and create a [spending plan](#).

✓ Get Help from Fidelity

There are many resources available to help you build your financial knowledge and practices. From videos like "[Tell me what I should be doing at my age](#)", "[How can I get help with needs beyond retirement?](#)", and "[How can Fidelity help me with my various financial goals?](#)", to [attending workshops](#).

✓ Use Other Resources Available to You

If you're ready to start saving and paying for other priorities beyond essential expenses and emergency savings, check out how to "[Manage all your medical bills](#)". Or learn about ways to save for major life events like getting married, becoming a parent, buying or selling a home, saving for college and more [here](#).