

A Quick Checklist for New Adults



- ✓ Understand your health insurance coverage and keep your insurance information accessible.
- ✓ Know your Social Security number and where your important documents are stored.
- ✓ Maintain a checking and savings account.
- ✓ Start building credit responsibly.
- ✓ Learn how to schedule your own medical appointments.
- ✓ Keep an updated emergency contact list.
- ✓ Understand basic tax and employment paperwork.
- ✓ Register to vote.
- ✓ Consider a Health Care Power of Attorney, HIPAA Authorization, and Financial Power of Attorney.
- ✓ Review any beneficiary designations on financial accounts or employment benefits.

Schedule a Complimentary Consultation 

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