



Financial and Legal Matters for Your Attention

Most of us need to maintain a budget and track our household expenses and income. In addition, there are also important financial or legal matters to be aware of. Here's a list of what most people include in a budget . . . and need to pay attention to.

Income

- Earnings from a job
- Investment earnings
- Social Security Income
- Retirement or other

Expenses

- Mortgage or rent
- Utilities
- Insurance (home, auto, health, life)
- Home repairs
- Food
- Toiletries
- Clothing
- Communications: phone, internet, and television
- Transportation
- Children, grandchildren, and extended family
- Travel or vacation
- Miscellaneous or unexpected

Important financial and legal matters to track:

- Insurance policies
- Investments
- Retirement accounts
- Wills, trusts, and advance directives
- Social Security
- Medicare and/or Medicaid
- Alimony