



# YOUR FINANCIAL PRESCRIPTION

## FINDING A FINANCIAL PLANNER

[www.CFP.net/Search](http://www.CFP.net/Search)

[www.PlannerSearch.org](http://www.PlannerSearch.org)

<http://findanadvisor.napfa.org>

## FINANCIAL LIFE SKILLS RESOURCES

- Budgeting** – <http://foundation-finplan.practicalmoneyskills.com>
- Navigating Your Financial Waters** – Shows systematic steps for managing and planning your finances. A concise tool designed for individuals to assess their financial strategy.  
[http://www.foundation-finplan.org/associations/9627/files/Navigating\\_Your\\_Financial\\_Waters.pdf](http://www.foundation-finplan.org/associations/9627/files/Navigating_Your_Financial_Waters.pdf)
- Practical Money Skills** – <http://foundation-finplan.practicalmoneyskills.com>
- MoneySmart online course** - Financial Education Program on topics such as banking, credit, savings, housing and consumer rights designed to help individuals learn the basics of personal finance. –  
<http://foundation-finplan.org/displaycommon.cfm?an=12>

## CREDIT

- Free credit report** – <https://www.annualcreditreport.com>  
If there is a mistake on your credit report, go to all 3 reporting agencies
  - Equifax: (800) 685-1111
  - Experian: (800) 493-1058
  - TransUnion: (800) 916-8800
- Understanding Credit Scores** – <http://foundation-finplan.whatsmyscore.org>
- Find a credit counselor** – <http://www.nfcc.org/FirstStep/locator.cfm> - 1-800-388-2227

## MILITARY PERSONNEL AND FAMILIES

**Accomplishing Your Financial Mission** – Information about the financial planning process, credit and debt management and the Thrift Savings Plan in this FREE publication. Includes sample planning forms for assessing your financial strategy – <http://foundation-finplan.org/displaycommon.cfm?an=12>

## QUICK CHECK-LIST

- Max out your 401K to the match
- Consider a Roth IRA
- Make and/or update your will
- Check and Update Insurance and Beneficiaries
- Review Social Security Statement
- Housing help - <http://portal.hud.gov/portal/page/portal/HUD/contact> - 1-800- Fed-info (333-4636)

## OTHER ITEMS

**Certified Financial Planner Board of Standards** – [www.CFP.net](http://www.CFP.net)

**Financial Planning Association** – [www.FPAnet.org](http://www.FPAnet.org)

**National Association of Personal Financial Advisors** – [www.NAPFA.org](http://www.NAPFA.org)

