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Life Event Planning Checklist

New Graduates

- Create Post College Budget
- Review Cash Flow and Emergency Fund
- Review What Benefits Your New Job Offers / Review 401(k)
- Create a Realistic Savings Plan to Start Investing Consistently
- Set Up Monthly Investing Plan
- Create Short and Long-Term Goals
- Open a Roth IRA
- Review your Credit Score
- Review Student Debt and Options for Repayment
- Review all of these items with your financial advisor



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