



## My Financial Wellness Action Plan

*It's never too late to start*

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of Employee Trust Funds  
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Use this financial action plan to help you set your course for financial wellness.

**Date to be completed**    **Goal (pick one or two)**

\_\_\_\_\_ Keep a diary of my expenses for \_\_\_\_\_ week(s).

\_\_\_\_\_ Start or update a spending plan/budget.

\_\_\_\_\_ Find new way(s) to save money, list them:

\_\_\_\_\_ Review insurance for appropriate coverage and competitive rates:

- Automobile insurance
- Homeowner's or renter's insurance
- Annuities
- Health insurance: State of Wisconsin Group Health Insurance Program  
It's Your Choice open enrollment period in October
- Disability income insurance
- Medicare, Medicare Supplement, Medicare Select, Medicare Advantage,  
Medicare Cost, Medicare Part D, Medicaid
- Worker's compensation

\_\_\_\_\_ Check your credit report and correct errors, if any.

\_\_\_\_\_ Check your mortgage rate and determine if refinancing makes sense.

\_\_\_\_\_ Use Ballpark E\$timate calculator (retirement estimate tool) at  
[www.choosetosave.org/ballpark](http://www.choosetosave.org/ballpark).

\_\_\_\_\_ Learn about the Wisconsin Deferred Compensation Program at [etf.wi.gov](http://etf.wi.gov) and find  
out whether it's offered by your employer. Call 1-877-457-9327 or visit  
[www.wdc457.org](http://www.wdc457.org) to start or enhance your WDC account.

\_\_\_\_\_ Sign up for ETF E-mail Updates at [etf.wi.gov](http://etf.wi.gov).

\_\_\_\_\_ Review the list of resources on the [EMPOWER website](http://etf.wi.gov/empower) (etf.wi.gov/empower) and  
pick two (or more) what you'd like to act on. List them here:

\_\_\_\_\_ Follow [@WI ETF](https://twitter.com/WI ETF) on Twitter.

\_\_\_\_\_ Add your own goal:

