



My Financial Wellness Action Plan

It's never too late to start

Wisconsin Department
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.

Start or enhance your Wisconsin Deferred Compensation Program account.
Call 1-877-457-9327 or visit www.wdc457.org.

Sign up for ETF E-mail Updates at 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 on. List them here:

Check out services offered by State of Wisconsin's LifeMatters® program at
1- 800-634-6433 or visit them online at <http://mylifematters.com>.

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Add your own goal:

