



Financial Bingo

1 Go 2 weeks without eating out (including takeout) ⁵	2 Write down 3 short-term savings goals and a plan to achieve them ⁵	3 Open a 529 account for your kids* ²⁰	4 Cancel 1 subscription/ service that you don't use ¹⁰	5 Save \$100 this month ¹⁵
6 Read a finance or retirement book / listen to a financial podcast ¹⁰	7 Create a "snowball" effect plan to pay off your credit cards* ¹⁰	8 Write down 3 long-term savings goals and a plan to achieve them ¹⁰	9 Open a "Save to Win" share certificate with SESLOC* ¹⁵	10 Review your 401k allocations* ⁵
11 Make an extra principal payment toward a loan ¹⁰	12 Create a weekly menu & grocery shopping list and stick to it! ¹⁰	13 Review & update your tax withholdings ¹⁰	14 Keep track of ALL of your spending for 1 week ¹⁰	15 Pay your credit card(s) bill in full this month ¹⁰
16 Add a direct deposit savings account: set it and forget it! ⁵	17 Pay off a loan ²⁵	18 Meet with a financial advisor or counselor ²⁰	19 Review your credit report* ⁵	20 Make a plan to save \$200 by a specific date ⁵
21 Increase your 401(k) contribution by 1%* ¹⁰	22 Save \$50 this month ¹⁰	23 Pull your social security statement and review your lifetime earnings* ⁵	24 Donate \$20 to your favorite local charity ¹⁰	25 Start an emergency fund with a goal of \$400 by year end ¹⁰

Card 1

* = click for more information



Financial Bingo

1 Sell/donate at least \$100 of unused items  15	2 Subscribe to a financial newsletter or blog 5	3 Kick a bad money habit for 1 month  10	4 Have a "money date" with your significant other: set one joint goal for financial health 5	5 Set up automatic bill pay on at least 2 accounts  5
6 No new charges on your credit card for an entire month (except auto-bill pays) 20	7 Sign up for identity theft monitoring services 5	8 Designate a power of attorney 15	9 Take a daily money minute for 10 days: spend 1 minute a day checking all financial transactions 5	10 Create a financial vision board* 10
11 Use SESLOC's (or other provider) account manager to see all accounts and transactions in one place 10	12 Add/Update your beneficiaries 10	13 Complete Fidelity's retirement planning tool: are you on track?* 5	14 Open an investment account 15	15 Create a trust  20
16 Update your will, or create one 15	17 Find a money buddy and meet once a week to share ideas 10	18 Review the guide to renter's insurance; is it for you?* 10	19 Create a plan to become debt free 10	20 Make a credit payment each week (4 times) instead of once a month 10
21 Calculate your net worth*  10	22 Research credit cards with better terms than what you have 5	23 Create a system for tracking your finances that you can use ongoing  10	24 Have a "no spend" day 10	25 Unsubscribe from 5 email lists  10

Card 2