



COVER YOUR ASSETS *Checklist*

Next Step: Check off any items you have completed.

Not working on any of them, discouraged, or stuck, reach out for some assistance.

HEALTH: WELL CARE

If you don't take care of your body where will you live?

- ☐ Health insurance (sick care)
- ☐ Supplemental insurance to fill the gaps
- ☐ Do you know your numbers (blood pressure, cholesterol, blood sugar, etc.)
- ☐ Know your pro-active numbers (Omegas, Magnesium, Vitamin D3)
- ☐ Do you have a daily nutritional program to fill your nutrient gaps created by your diet? No, get recommendations here <https://bit.ly/RhondasMeologyQuiz>
- ☐ Create a NEW health habit (reduce alcohol consumption, daily movement or exercise, achieve optimal weight)

CRITICAL TEAM MEMBERS

No DIY-ing.

- ☐ Financial Professional or Advisor
- ☐ Life Insurance Agents: Life, Health, Home, Auto
- ☐ Banker
- ☐ Financial Coach
- ☐ Estate Attorney
- ☐ Health Coach
- ☐ Doctor, Naturopath, Physician's Assistant

FINANCES: WEALTH CARE

Take care of your money so you can enjoy your lifestyle!

- ☐ Protect your income (short-term and/or long-term disability)
- ☐ Protect your job (FMLA)
- ☐ Long Term/Chronic Care in place
- ☐ Check your beneficiaries on your life insurance
- ☐ Know your rights (Fair Credit Reporting Act)
- ☐ Access to cash (savings, 401K, investments)
- ☐ Passive income can be a life saver
- ☐ Credit Card balances under control
- ☐ Student Loans/Other Loans

LEGAL RIGHTS: FAMILY CARE

Get your Docs in a row! Know where they are.

- ☐ Will, signed and filed
- ☐ Power of Attorney in place
- ☐ Medical Power of Attorney in place
- ☐ Advance Directives (ie: DNR or Do Not Resuscitate)
- ☐ Family Trust, if necessary
- ☐ Pet Trust, care for our furry family members

Decisions to be made...

1. Organ donor
2. Cremation or Burial



LIFESTYLE

How do you define lifestyle:

A dream trip or activity you've always wanted to do? Dream BIG!

What are 3 action steps you can take to make a reality?

1.

2.

3.

Which one is your next step? Circle it.

By when will you take that next step?

Need more guidance?

I have expanded resources and other support options
at TheWELLthyPeople.com

Schedule a complimentary call at
<https://calendly.com/rhonda-19/take-a-look-overview-session>

Directly reach me at...

[Rhonda Bolich-Lampo](mailto:RhondaBolich-Lampo) | Rhonda@TheWELLthyPeople.com

