

**Celebrating Over 30 Years...**

**...and Supporting You for the Next 30**

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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