



Personal Finance Calendar

Setting a regular schedule to review your financial situation is vitally important to your financial health and overall well-being. This Personal Finance Calendar suggests the kinds of financial review you should complete monthly and periodically, lays out a month-by-month schedule of significant financial events and documents to evaluate and update ongoing, and discusses review to undertake when major life events occur.

Birthdays & Life Events

Following we lay out some “milestone” years in many people’s financial lives. These life events may not all apply to you, but it’s good to familiarize yourself with them and consider which are meaningful for you.

