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PUGH PERSPECTIVES

THE PUGH WEALTH MANAGEMENT NEWSLETTER



7 Steps to Achieve Financial Fitness

What is financial fitness? Briefly, financial fitness describes your overall financial well-being, akin to how physical fitness pertains to your physical health.

The American Medical Association says, “Regular physical exercise is one of the single most important contributors to a healthy lifestyle and delivers benefits which extend far beyond the doctor's office.”

We aren't doctors, personal trainers, or physical therapists. We will defer to the specialists in their respective fields for advice on maintaining a healthy lifestyle.

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Creating a Financially Organized Life

Here's how to get a jump-start on creating a system to organize your bills, statements, policies, and other financial paperwork.

Financial organization is a cornerstone of a healthy financial life. At the most basic level, financial organization saves time and money because it aids in paying bills on time, finding needed documents during tax season, providing proof of payment, disputing credit cards or billing errors, and avoiding the stress of dealing with piles of unorganized bills and paperwork

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2025 Financial Fitness Checklist

Your Name: _____

Your Family			Notes
Yes	No		
		Do you expect any changes in your relationship status: marriage, cohabitation, divorce?	
		Do you expect any changes in family composition: birth, adoption?	
		Do you have a child who will be going to college this year?	
		Do you have a child or dependent with special needs?	
		Do you have any adult children who have moved back home or are otherwise in need of financial support?	
		Do you have an elderly parent in need of financial or care-giving support?	

Now is the perfect time to look at various aspects of your life and develop a plan to improve your financial fitness

Click the link for a list of questions that may have an impact on your financial health in 2025

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