NEBRASKA ENERGY FEDERAL CREDIT UNION

FINANCIAL PREPAREDNESS

Simple steps to help you feel prepared.

1. Start an Emergency Fund

Set up a small automatic transfer. Even having $100 saved in a separate fund can help when unexpected expenses come up.

Your Target Goal:

$ ______________

2. Review Your Beneficiary

Make sure your credit union account beneficiary is current.

I have reviewed within the last year.

☐ Yes ☐ Not yet

Date Reviewed:

3. Organize Important Records

Keep important documents and copies in two locations.

Documents to gather:

- ☐ Passport
- ☐ Will or Estate Documents
- ☐ Insurance Policies

4. Keep Emergency Cash

Keep a set of small bills in a secure place

Your Goal Amount:

$ ______________

5. Review Insurance

Check coverage deductibles and claim contacts.

Insurance Checklist:

- ☐ Auto
- ☐ Home/Renters
- ☐ Life
- ☐ Health
- ☐ Other:

6. Create a Home Inventory

Catalog your belongings and back up photos digitally to simplify insurance claims.

Record important details:

- ☐ Item name & description
- ☐ Brand, model, serial #
- ☐ Receipts or proof of purchase
- ☐ Photos of valuables in each room

QUESTIONS?

Talk with one of our financial counselors for more help.