CHECKLIST · FINANCIAL MANAGEMENT

FREE PREVIEW

Planning for Medical Expenses



Planning for medical expenses ensures you're financially prepared for routine care and unexpected emergencies. Use this checklist to stay organized.

9 steps · Print-ready A4

NAME	START	TARGET DATE

1 Assess Your Current Healthcare Needs

List your regular medical expenses, such as check-ups, prescriptions, or treatments.

EXAMPLE *"I spend $100 monthly on prescription medications and $50 on therapy sessions."*

2 Review Your Health Insurance Policy

Understand what your plan covers, including co-pays, deductibles, and out-of-pocket maximums.

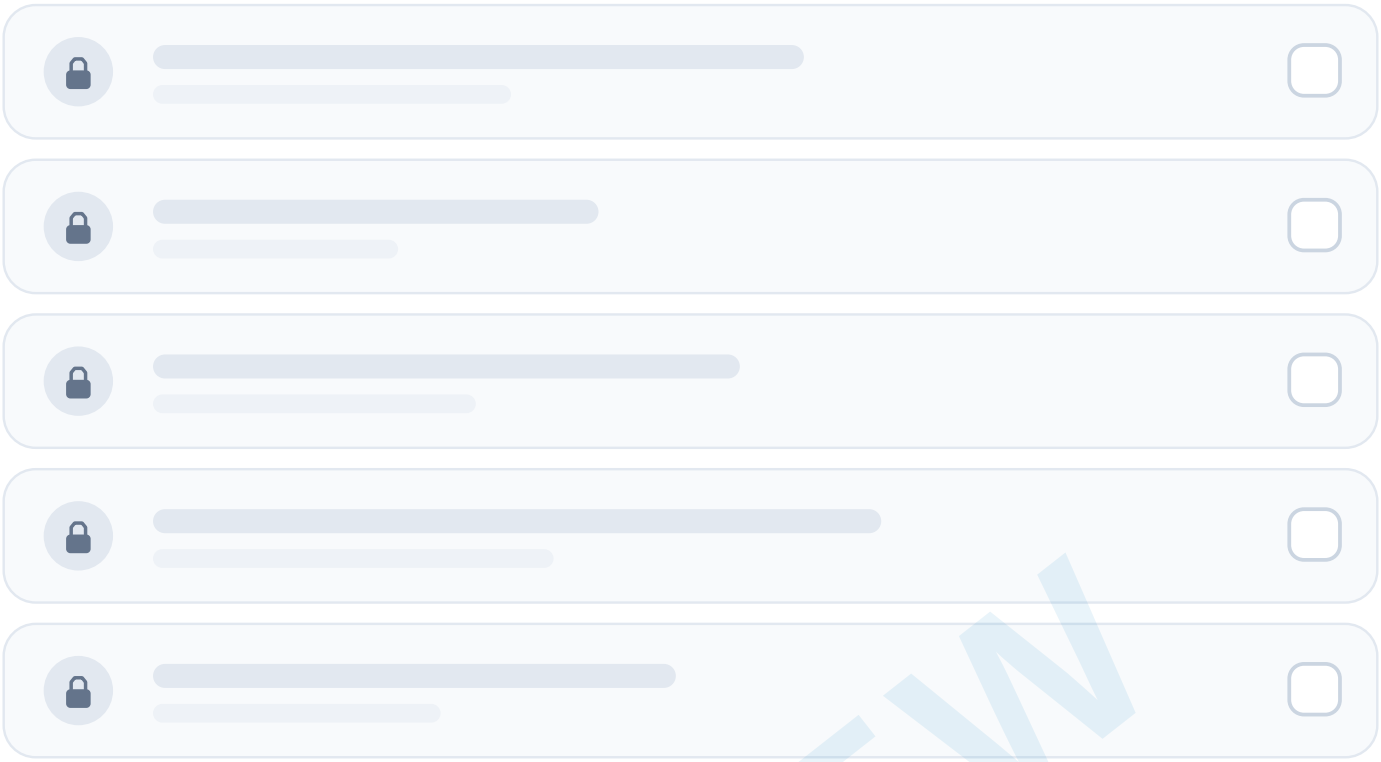
TIP *Contact your insurance provider to clarify coverage limits for services like specialists or diagnostics.*

3 Build a Medical Emergency Fund

Save a specific amount for unexpected healthcare costs, like urgent care visits or minor procedures.

EXAMPLE *Start with $1,000 and gradually increase it to cover higher deductibles or unexpected surgeries.*

PREVIEW



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