



Session 4 Freedom Challenge and Homework

Session 4 - Protecting the Household and the Financial House | Participant Resource | Version 1.0

Privacy: Keep this resource for your personal use. Do not write account numbers, passwords, Social Security numbers, full birth dates, or other sensitive identifiers.

Choose one protection priority

- ☐ Locate a document.
- ☐ Verify a policy or workplace-benefit term.
- ☐ Review a primary or contingent beneficiary.
- ☐ Build the next emergency-reserve milestone.
- ☐ Ask an appropriately qualified professional.

Commitment

Action: _____

Owner: _____ Completion date: _____

How I will know it is complete: _____

Education notice: FFES provides general financial education, not individualized investment, tax, legal, insurance, credit, mortgage, Social Security, Medicare, pension, or estate-planning advice. Rules and individual circumstances differ and can change.