

Sample Financial Planning Checklist

	✓	Action Item
		Getting Started
Pre-Matriculation		Complete FAFSA or Confirmed Financial Aid Packet
		Housing Accommodation Costs
		Moving Costs
		School Recourses/Supply costs (Scrubs, New Attire, Medical instruments, etc.)
		Create a Budget
		Organize Healthcare Records
		Establish a Financial Plan
M1		Meet with financial aid officer/rep to discuss financial plan
		Revise budget to include first year expense and other hidden costs
		Complete FAFSA
		Complete the <i>AAMC Financial Wellness</i> tool. https://aamcfinancialwellness.com/home/index.cfm
		Modify Financial Plan
M2		Meet with Financial Aid officer/rep and revise budget to meet the needs of second
		Complete FAFSA in October?
		Search scholarships/other financial resources
		Step 1 exam costs – registration and prep materials (if applicable)
		Modify Financial Plan
M3		Meet with Financial Aid officer/rep and revise budget to meet the needs of third year
		Complete FAFSA
		Search scholarships/other financial resources
		Transportation Costs
		Meal costs – may not have time to prepare food
		Away rotations – transportation, housing, food, etc. (if applicable)

	✓	Action Item
M3	Modify Financial Plan	
		Step 1 costs – registration and prep materials (if applicable)
		Step 2 CK costs – registration and prep materials (if applicable)
		Step 2 CS costs - registration, transportation, prep materials (if applicable)
M4	Modify Financial Plan	
		Meet with Financial Aid officer/rep and revise budget to meet the needs of fourth year and financially prepare for interview process
		Complete FAFSA
		Search scholarships/other financial resources
		Away rotations – transportation, housing, food, etc. (if applicable)
		Residency Application Costs
		Interview costs – transportation, housing, food, clothing, etc.
		Step 2 CK costs – registration and prep materials (if applicable)
		Step 2 CS costs - registration, transportation, prep materials (if applicable)
Transition to Residency	Choose a Repayment Plan	
		Meet with Financial Aid officer/rep, discuss repayment options choose a repayment plan
		Create a budget for transition to residency (e.g. moving costs etc.)
		Create a tentative budget for your first year of residency