

# Drexel March Money Madness

Complete 12 activities to earn 15 wellness incentive points.

Visit [drexel.edu/hr/engagement/money-madness](https://drexel.edu/hr/engagement/money-madness) for additional information and tools to complete the activities below

## The Basics

- Check savings account(s) balance(s)
- Check checking account(s) balance(s)
- Check retirement account(s) balance(s)
- Check 529 savings plan(s) balance(s)
- Track the maturity of your savings bonds
- Check your credit score
- Check your credit card balance(s)
- Donate to a favorite charity
- Donate clothing/items you no longer use to a local charity

## Positioning Yourself for Success

- Attend a Fidelity/TIAA/Vanguard Roth 403(b) session +
- Schedule a counseling session with your retirement vendor
- Invest in yourself: register for a professional development opportunity +
- Organize your financial life

## Passing the Buck

- Educate the kids in your life about healthy financial practices
- Open a savings account for a kid in your life
- Open 529 savings plan(s)

## Found Money

- Collect loose change and deposit in savings account
- Investigate refinancing your mortgage
- Optimize your savings/checking accounts
- Start a 52-week savings plan
- Investigate credit cards with lower interest rates

## The Big Picture

- Calculate your net worth
- Calculate your net debt
- Identify your spending triggers to curb impulse buying
- Create a budget
- Set financial goals: short term, mid-term, long term

\* Eligible for wellness incentive credits  
+ Register through Career Pathway in DrexelOne

Name: \_\_\_\_\_

Email: \_\_\_\_\_

*Return completed forms to [hr@drexel.edu](mailto:hr@drexel.edu)*