MONTH 03 • READER TOOLKIT

Self-Employed Benefits Planner

A practical worksheet to go with this month's HerLegacy letter. Keep it for yourself, print it, and take the next step at your own pace.

SELF-EMPLOYED CHECKLIST

- ☐ I have checked estimated tax obligations with a tax professional.
- ☐ I have compared eligible health coverage options.
- ☐ I know my monthly business and personal fixed costs.
- ☐ I have considered income protection and retirement savings.

PLAN IT

One business expense or benefit to review:

One question for my tax or insurance professional:

YOUR ONE SMALL NEXT STEP:

EXPLORE MORE: irs.gov/businesses/small-businesses-self-employed