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May 2027 Money Checklist

Tick each box as you finish it. Dated items come from official sources (listed at the bottom).

DATES THIS MONTH

- [ ] **May 1** New Series I savings bond rate takes effect

THIS MONTH'S FOCUS

- [ ] Compare your savings yield with current CD and Treasury rates
- [ ] Check your emergency fund against 3 to 6 months of essentials
- [ ] Budget summer costs now: travel, camps, childcare
- [ ] Review beneficiaries on your retirement accounts

EVERY MONTH

- [ ] Pay yourself first: move savings out on payday
- [ ] Scan every account for charges you don't recognize
- [ ] Pay every bill on time (autopay at least the minimum)
- [ ] Cut, cancel or renegotiate one bill or subscription
- [ ] Add to your emergency fund (goal: 3 to 6 months of essentials)
- [ ] Check a free credit report (weekly at AnnualCreditReport.com)
- [ ] Compare what you planned to spend with what you spent
- [ ] Send any windfall to a goal before you spend it

NOTES

Sources: FTC: Free credit reports; TreasuryDirect: I bonds. Dates verified Nov 15, 2026. Educational only, not financial, tax or legal advice. Full list with links: digitalwealthsource.com/articles/article-monthly-money-checklist