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October 2027 Money Checklist

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

DATES THIS MONTH

- ☐ **Oct 1** Next year's FAFSA must be available by law by this date
- ☐ **Oct 15** Extended 2026 tax returns are due
- ☐ **Oct 15** Medicare open enrollment opens (through Dec 7)

THIS MONTH'S FOCUS

- ☐ Compare Medicare plans if you or a parent has Medicare
- ☐ Choose employer benefits for next year: health plan, HSA and FSA amounts
- ☐ File the FAFSA early if a student in your family needs aid
- ☐ Review your home and auto coverage limits

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; IRS: When to file; Medicare.gov: Joining a plan; U.S. Department of Education: FAFSA launch (Sep 23, 2026). Dates verified Nov 15, 2026. Educational only, not financial, tax or legal advice. Full list with links: digitalwealthsource.com/articles/article-monthly-money-checklist