

# FIERCE FINANCIALLY INDEPENDENT FEMALES

WEALTH MANAGEMENT | FINANCIAL PLANNING | INVESTMENTS

DIRECTIONS: Take a current inventory of your awareness/knowledge on where the pieces to your financial picture. What makes up your cashflow? What assets and liabilities do you have that make up your net worth? What types of insurance policies do you have? How do you utilize tax planning to assist in your wealth strategy? Do you have legal documents in order?

	AWARENESS	ACTION
COMPENSATION		
NET WORTH		
SAVINGS & INVESTMENTS		
INSURANCE		
TAXES & ESTATE		

DIRECTIONS: Now, take the time to draw out the goals that you have in your life (as of now). Take into consideration, your current financial status, what will you need to do to get to your goals: more savings, increased income, investment strategy, or hiring a professional.

#### **GOALS**

Purchases, savings, date of importance, projects you want to do, places you want to travel.

#### **REALITY**

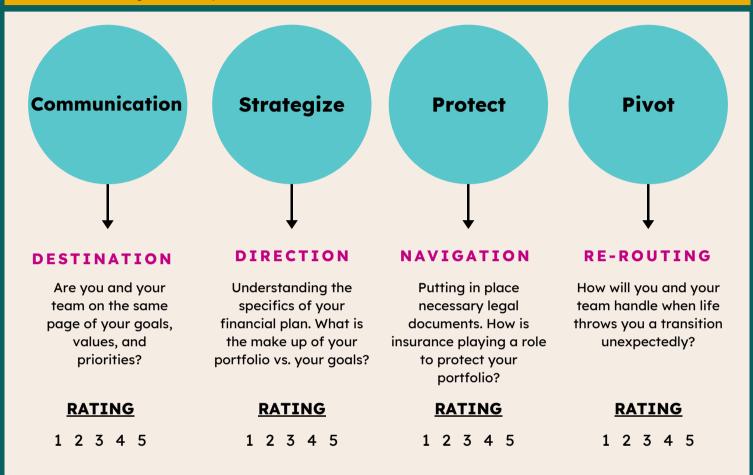
Where are you now. What are you willing to take action on to get there?

## forethought PLANNING

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DIRECTIONS: There are some life transitions that we can plan for. We can plan for buy a home, getting married, having children, retirement, and even some parts of loss. The basis of planning for these is having a roadmap and financial plan. Rate below where you feel like you are. In the box below, write out what you need to do be proactive around have a stronger road map.



DIRECTIONS: Circle the most important goal that you want to work toward. Set three action items related to this goal. Then set a check-in point to make sure you are making progress to achieving them.

## **ACTION ITEMS**

### PROGRESS CHECK

DIRECTIONS: Pick a date and time that you all will have your regular financial date.