

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?

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.

 <p>Communication</p> <p>↓</p> <p>DESTINATION</p> <p>Are you and your team on the same page of your goals, values, and priorities?</p> <p>RATING</p> <p>1 2 3 4 5</p>	 <p>Strategize</p> <p>↓</p> <p>DIRECTION</p> <p>Understanding the specifics of your financial plan. What is the make up of your portfolio vs. your goals?</p> <p>RATING</p> <p>1 2 3 4 5</p>	 <p>Protect</p> <p>↓</p> <p>NAVIGATION</p> <p>Putting in place necessary legal documents. How is insurance playing a role to protect your portfolio?</p> <p>RATING</p> <p>1 2 3 4 5</p>	 <p>Pivot</p> <p>↓</p> <p>RE-ROUTING</p> <p>How will you and your team handle when life throws you a transition unexpectedly?</p> <p>RATING</p> <p>1 2 3 4 5</p>
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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.

<p>ACTION ITEMS</p> <p>1</p> <p>2</p> <p>3</p>	<p>PROGRESS CHECK</p> 
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DIRECTIONS: Pick a date and time that you all will have your regular financial date.