

Financial Action Plan

Whether you are working through the ProsperiGuide website or working in consultation with a financial planner, you can use this worksheet to identify areas of financial planning that require your attention. List recommendations and strategies, record action steps, and track your progress on this worksheet. Use it in conjunction with a ProsperiGuide financial plan checklist or the online My Action Plan tool.

Before using this form:

1. Download and save a copy to your computer or cloud storage.
2. Close the online version and open the copy you saved.
3. Enter your information and save the form.
4. Save again after making changes.

COMPONENT	SUBJECT	ACTIVITIES / STRATEGIES / ACTION STEPS	DATE TO BE COMPLETED
Financial Planning	Goals		
	Opportunities		
	Obstacles		
	Planning Scenarios		
	Other		
Cash Management	Budget		
	Debt repayment		
	Savings vehicles		
	Other		

COMPONENT	SUBJECT	ACTIVITIES / STRATEGIES / ACTION STEPS	DATE TO BE COMPLETED
Protecting Assets and Income	Insurance analysis		
	Insurance policies		
	Other		
Investing	Goals and objectives		
	Asset mix		
	Portfolio changes		
	Other		
Planning for Retirement	Retirement scenarios		
	Transition timeline		
	Lifestyle plan		
	Other		
Tax	Deductions and credits		
	Investment accounts		
	Retirement income		
	Other		

COMPONENT	SUBJECT	ACTIVITIES / STRATEGIES / ACTION STEPS	DATE TO BE COMPLETED
Estate Planning	Documents		
	What If... file		
	Other		