Financial Life - Plan Summary

Define Goals	Steps toward improving financial future
• **HOT TOPIC:**	1. Assess mindset and commitment. Why now?
• **HOT TOPIC:**	2. Spending Plan and accountability
•	3. Emergency fund ($1,000)
•	4. Consumer debt elimination plan
•	5. 401k > or = to match. Gradual increase to max.
•	6. Emergency fund (3-6 mo. take home pay)
•	7. Goal Funding: Financial Freedom, Retirement, etc.
•	8. Track Net Worth
•	9. Pay off home early

Discover - SWOT Analysis

Strengths	Weaknesses
•	•
•	•
•	•
•	•
•	•

Opportunities	Threats
•	•
•	•
•	•
•	•
•	•

Track Action Steps

Item	Description	Due Date
		3 - month
		6 -month
		9 - month
		12 -month

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