



Your One Page Financial Plan

Client Name / Date

Why is Money Important to You?

Getting clear on your values will help make future money decisions easier.

- I want to help others
- I want to impact the lives of school age children in Africa

What are your Goals?

Money is the vehicle to reaching your goals, and not as the goal itself.

- I'm financially secure by 2018. (\$20k monthly income without work)
- My entire family spend 2 weeks together in a vacation rental house
- My wife and I can communicate our values and life lessons to our kids

Next Steps (3-6 months)

Focus on what we can control

- Begin the comprehensive retirement plan with my planners
- Get everyone's schedule for summer vacation house.
- Start systematic gifts from my Donor Advised Fund to Pencils of Promise.