



Your One Page Financial Plan

Client Name / Date

Why is Money Important to You?

- “Time with family, mainly outside”
- “Serving in our community”

Goals

- Have enough life insurance to feel comfortable that my family will be ok
- Retirement by 2025
- Education Accounts fully funded by 2019

Next Steps (3-6 months)

- Find appropriate Life Insurance
- Get retirement accounts purposefully allocated to align with goals
- Start monthly contribution of \$2,000 for the next 3 years