

ONE-PAGE FINANCIAL PLAN FOR: CLIENT NAME

VALUES

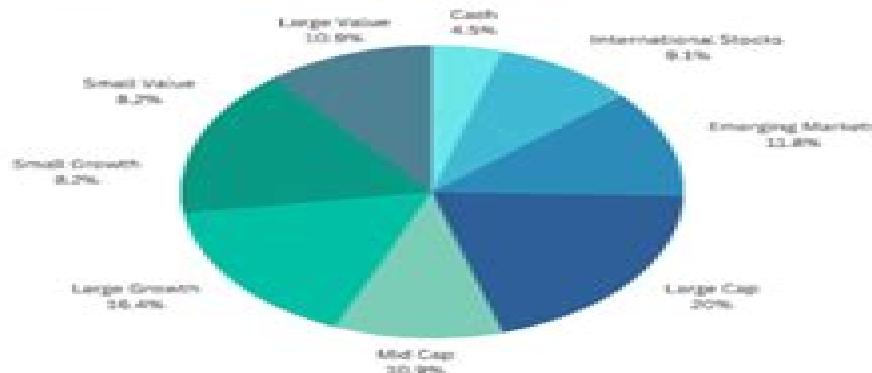
- Financial independence
- Charitable giving
- Creating a legacy for future generations

CASH FLOW

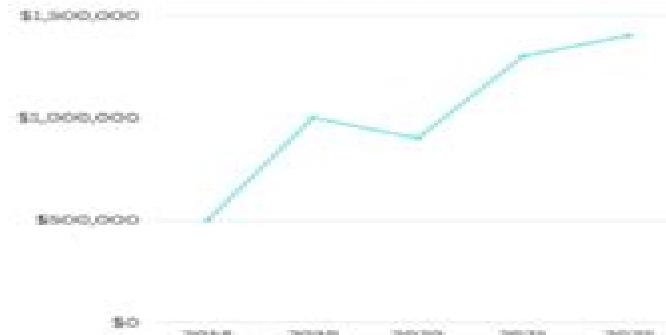
- Annual income: \$120,000
- Monthly expenses: \$8,000
- Surplus: \$2,000

GOAL	STATUS
Pay off \$20,000 student debt	On track
Max out 401(k) for this year	Behind
Contribute \$5,000/yr to IRA	On track
Open 529 account	Started

ASSET ALLOCATION



NET WORTH



ACTION ITEMS

- Adjust 401(k) contribution rate
- Compare rate quotes for term life insurance
- Set up recurring deposits to 529 account
- Draft budget for home improvement projects
- Review 401(k) and IRA asset allocation
- Open a high-yield savings account
- Review estate plan and evaluate the need for a trust
- Review tax withholding and consider making adjustments
- Update beneficiaries for 529 accounts
- Consider the advantages of a Roth IRA conversion

Online One Page Financial Plan Simple Smart

Brenda J. Mizgorski

Online One Page Financial Plan Simple Smart:

The One-Page Financial Plan Carl Richards, 2015-03-31 Whenever I tell people about my job as a financial advisor the conversation inevitably turns to how hopeless they feel when it comes to dealing with money. More than once they've begged Just tell me what to do. It's no surprise that even my most successful friends feel confused or paralyzed. Even if they have a shelfful of personal finance books they don't have time to make sense of all the information available. They don't just want good advice; they want the best advice so rather than do the wrong thing they do nothing. Their 401 k and bank statements pile up unexamined or maybe even unopened. What they don't realize is that bad calls about money aren't failures; they're just what happens when emotional creatures have to make decisions about the future with limited information. What I tell them is that we need to scrap striving for perfection and instead commit to a process of guessing and making adjustments when things go off track. Of course we're going to make the best guesses we can but we're not going to obsess over getting them exactly right. The fact is in a single page you can prioritize what you really want in life and figure out how to get there. That's because a great financial plan has nothing to do with what the markets are doing or what your real estate agent is pitching or the hot stock your brother in law told you about. It has everything to do with what's most important to you. By now you may be wondering: What about the details? How much do I need to invest each year and how do I allocate it? How much life insurance do I need? Don't worry; I'll cover those topics and many more sharing strategies that will take the complexity out of them. The most important thing is getting clarity about the big picture so you can cope with the unexpected. Maybe you'll lose the job you thought was secure; you'll take a financial risk that doesn't pan out; you'll have twins when you were only budgeting for one. In other words, life will happen. But no matter what happens this book will help you bridge the gap between where you are now and where you want to go.

Better Value Investing Andrew Hunt, 2015-08-06 Practical and powerful improvements for value investors. Buying undervalued shares and selling when the price is many times greater has a natural appeal and research shows it works. But not all value investors are successful. As Andrew Hunt shows in this must-read new book many are guilty of common errors in their planning and execution and these critically undermine their success. Better Value Investing provides a straightforward framework to help all value investors improve, showing them what to focus on and what to cut out in order to be successful. Supported by the latest empirical research, 15 years of real investing experience, studies of what the top investors have said and done, and wide reading, Andrew Hunt reveals how financial strength is at the heart of value investing, why to invest like an owner, the importance of contrarianism, why you should buy only the very best bargains, the essentials of constructing and managing a portfolio, how checklists control the process and keep the value investor on track. This concise guide to honing the craft of value investing is essential reading for all value investors, new and old. With its help you can concentrate on what is important, cut out errors and achieve what you set out to do, making you a better value investor.

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Thackeray, 2022-07-18 This book is written for students who are enrolled in their first professional course in health promotion program planning. It is designed to help them understand and develop the skills necessary to carry out program planning regardless of the setting. This book is unique among the health promotion planning textbooks on the market in that it provides readers with both theoretical and practical information *Que's Official Internet Yellow Pages* Joe Kraynak, 2005

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