

FINANCIAL PLANNING



Planning

- Retirement Planning
- Estate Planning
- Higher Education Planning
- Pension Option Planning
- Asset Allocation Planning
- Insurance Planning

Investments

- Traditional/ Roth IRAs
- 401(k)/ 403(b)s
- Individual Stocks/ Bonds/ Options
- Mutual Funds (A and C shares)
- 529B College Funds
- Portfolio Rebalancing
- Rollovers and Required Minimum Distributions
- Annuities
- Advisory Accounts
- Group Plans

Insurances

- Life Insurance
- Disability Insurance
- Long Term Care Insurance
- Group Plans

Common Goal Planning

- Retirement
- Buying a house
- Children's Education
- Insurance Protection
- Estate Planning



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BLACK DOLLAR DAYS

Wear **Pink**. Spend **Green**. Buy **Black**!

BUILD YOUR ECONOMIC WEALTH PROGRAM COMMITTEE

Your Financial Snapshot: A Quick Start Worksheet

Name (Optional): _____ Date: _____

WHERE ARE YOU TODAY?

Monthly Income (after taxes): \$ _____

Total Monthly Expenses: \$ _____

Emergency Fund (Yes / No): _____

Outstanding Debt (circle all that apply):

☐ Credit Card ☐ Student Loan ☐ Auto Loan ☐ Mortgage ☐ Other: _____

SHORT-TERM GOALS (NEXT 1-3 YEARS)

Example: "Pay off credit card debt"

1. _____
2. _____
3. _____

LONG-TERM GOALS (3+ YEARS)

Example: "Buy a home" or "Retire at 65"

1. _____
2. _____
3. _____

WHAT'S MOST IMPORTANT TO YOU?

Circle your top 3 priorities:

Debt-Free Living | Homeownership | Education | Career Growth | Travel | Wealth Building | Retirement | Family Security

Questions I Have:

1. _____
2. _____
3. _____



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