

ONE-PAGE FINANCIAL PLAN TEMPLATE

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			LIFE	
TOTAL ASSETS	-			
		INSURANCE	INCOME	
TOTAL LIABILITIES	-			
			DISABILITY	
NET WORTH	-			
			TRAUMA	
GROSS INCOME BEFORE TAX	-			
		ESTATE	WILLS	
NET INCOME AFTER TAX	-			
	-		GUARDIANSHIP	
TOTAL EXPENSES				
		PLANNING	POWER OF ATTY	
TOTAL RETIREMENT FUND CONTRIBUTION	-			
			BDN	
OTHER	-			
GOAL	ACTION		RESOURCES & REVIEW	
Make goals both clear and measurable	Define steps required to accomplish		eam member assisting with goal, such as your	
	set goals and overcome any roadblocks	broker, real estate agent, accountant, financial advisor, etc., and date goal to be reviewed for status or reassessment		

GOAL Make goals both clear and measurable	ACTION Define steps required to accomplish set goals and overcome any roadblocks	RESOURCES & REVIEW List financial team member assisting with goal, such as your broker, real estate agent, accountant, financial advisor, etc., and date goal to be reviewed for status or reassessment
		HANDLED BY REVIEW DATE
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