

Financial Plan Worksheet

FINANCIAL GOALS

SHORT TERM

LONG TERM



CASHFLOW



Net Worth Check

Budget

RISK MANAGEMENT



Health Insurance

Home & Auto Insurance

Life Insurance

Other*

SAVINGS



Emergency Fund

INVESTMENTS



401k Plan

Individual Retirement Account (IRA)

Other*

NOTES

*Other insurances may include dental and vision if separate from health, particular licenses, etc.

*Other investments may include: Individual stocks, Employee stock purchase programs, real estate, etc.