

# Personal Financial Worksheet

Congratulations on taking a big step towards a more secure financial future! Please complete as much of this worksheet as you can prior to your personal one on one meeting to help make the most effective use of the meeting. You'll have the opportunity to discuss your financial goals and current status in order to create a personalized financial action plan with the help of a financial professional.

Please bring copies of the following to your first meeting to help us gather information:

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# Mcgraw Hill Personal Finance Activity Answers

**Michael Brown**



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