7 Things Your Financial Plan Should Include

ESTATE PLANNING

Doing this now can save a lot of heartache in the future.

EDUCATION PLANNING

Start planning for the cost of your own education or for that of your children.

T

FINANCIAL HEALTH

May include details such as your net worth, your budget, and cash flow.

TAXES

Financial planners use this section to shrink your tax burden so you have more money left over to reach your goals.



RISK

Hidden dangers that could prevent you from reaching your goals.

RETIREMENT

Are you saving enough to reach your retirement spending goals? How much do you need to retire?

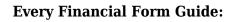
INVESTMENT

Portfolio performance and topics such as risk, reward, correlation, stress tests, etc.

3

Every Financial Form Guide

Ying-Ying Zheng



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