Financial Plan: Client
Date

GEN Y PLANNING
FINANCIAL PLANNING FOR MY GENERATION

Where You Are Now

Your Net Worth

$0

As of XX 2017

Assets: $0
Liabilities: $0

Since you recently paid off your debt, we are going to redirect those funds to some of your goals!

Net Worth

Retirement: $0
Investments: $0
Cash: $0

Your Top Money Goals:

- Goal 1

Your Action Items

- [ ] Important action item.

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My Thoughts

Things I think.

Already Completed Tasks:

- ✓ .

Topics for Our Next Meeting

- ○ .