

OUR GUIDANCE.  
YOUR JOURNEY.

CANDORPATH FINANCIAL

Dream PATH

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THIS NOTEBOOK BELONGS TO:

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## A NOTE FROM OUR FOUNDERS:

Your financial journey is uniquely yours, much like a book filled with chapters that tell the story of your life. We are honored to be part of this next chapter, contributing in our small way to your success. At CandorPath Financial, we believe financial success is deeply personal, and our mission is to help you define and achieve it.

This journal is more than just a place to track numbers or set goals—it's a reflection of your journey, dreams, and progress. Whether you're planning for life's major moments or celebrating small wins, we hope it becomes a trusted companion along the way.

When we founded CandorPath Financial, we envisioned an ensemble practice where collaboration, honesty, and advice-driven solutions guide everything we do. By working together as a team, we're able to provide comprehensive guidance tailored to every phase of life.

As you move forward, know that we are here to support and equip you with the knowledge needed to make informed financial decisions. We are grateful for the opportunity to walk this path with you and look forward to seeing the goals you accomplish and the dreams you realize.

Here's to a future filled with clarity, confidence, and success.

Warm regards,

A handwritten signature in blue ink that reads "John & Matt". The signature is fluid and cursive, with the ampersand connecting the two names.

John Kennedy, CFP® & Matthew Marcoux, CFP®, EA

*Discover more resources and learn how CandorPath can support your financial journey at [CandorPath.com](https://CandorPath.com).*

**ALL YOU NEED IS THE PLAN,  
THE ROAD MAP,  
AND THE COURAGE TO PRESS  
ON TO YOUR DESTINATION.**

EARL NIGHTINGALE

DATE

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1. What past experience has had the greatest impact on the way you view your finances, and what did it teach you about your relationship with money?

2. How would you describe your financial personality today—are you naturally a saver, a spender, or somewhere in between? In what ways has this mindset supported or challenged you in achieving your financial goals?

3. What does financial success look like for you, and what key milestones are you aiming to achieve in the future?

DATE \_\_\_\_\_

## TODAY'S GOALS:

## NEXT STEPS:

NOTES