

FINANCIAL PLANNING ROADMAP

Date: _____ | Prepared For: _____

1. ASSET ALLOCATION

CATEGORY	CURRENT VALUE	TARGET %
Cash / Emergency Fund	\$	
Retirement (401k/IRA)	\$	
Brokerage Accounts	\$	
Real Estate / Home	\$	
Other Assets	\$	

2. DEBT OBLIGATIONS

LIABILITY	BALANCE	INTEREST RATE
Mortgage	\$	%
Student Loans	\$	%
Credit Cards	\$	%
Auto/Personal	\$	%

3. RISK MANAGEMENT

Life Insurance (Term/Whole)

Disability Coverage

Health Insurance / HSA

Umbrella Policy

Estate Plan / Will

4. STRATEGIC MILESTONES

Maximize Tax-Advantaged Contributions

Rebalance Investment Portfolio

Review Beneficiary Designations

Update Net Worth Statement

Annual Credit Report Audit

5. PRIORITY ACTION ITEMS

Template for planning purposes only. Consult with a certified financial professional for specific advice.