

9 Areas for Planning Your Life

"Your Money"

Answer the questions below. Then write down the vision of what you want your financial life to look like in 1, 5, 10, and 20 years, and the steps it will take to get there.

1. Do you want to retire one day, or work as long as you can?
2. Do you want to have the freedom to do what you want with your time? How do you want to spend that time (Family, travel, charity work, hobbies, etc.)?
3. Where will your money come from when you can't work anymore?

4. Do you want to keep from being a financial burden to your kids? What do you need to do to make that happen? You should specifically address things like savings, debt, insurance, etc.

Describe what you want your financial future to look like in:

1 year-

5 years-

10 years-

20 years-