

Financial Planning Worksheet

Use this worksheet for basic financial planning. Answering these four simple planning questions will help you reach your goals.

1. Where do you want to be	2. Where are you now?	3. What do you need to be there?	4. What vehicles could get you there on time?

life event	\$ needed	starting \$	# of years left	what investments?
1.				
2.				
3.				
4.				
6.				
7.				
8.				
9.				
10.				