Financial Planning Experience
Happy Family
Month, Date, Year

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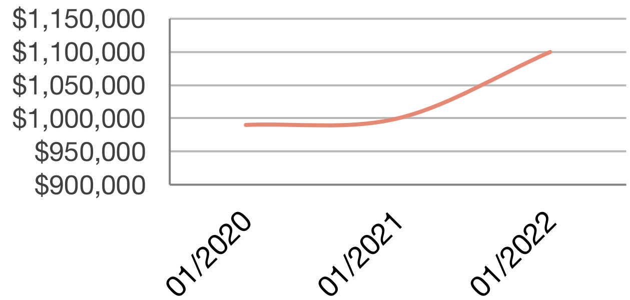
HAPPY FAMILY PLAN SUMMARY
MONTH YEAR

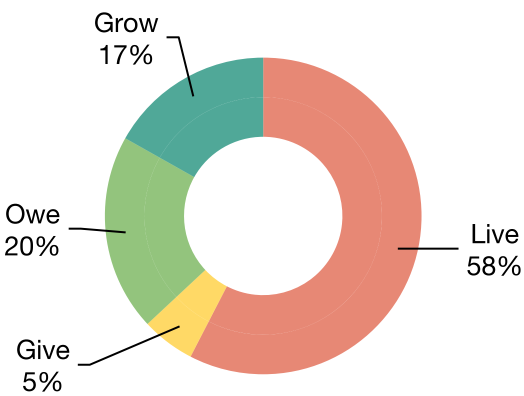
STATEMENT OF FINANCIAL PURPOSE

Your unique statement that identifies what's most important in your life: your people, your priorities, and your goals. It's the "why" behind your money and serves as a guidepost to remind you that the decisions you make about your finances today can help you achieve a greater life purpose.

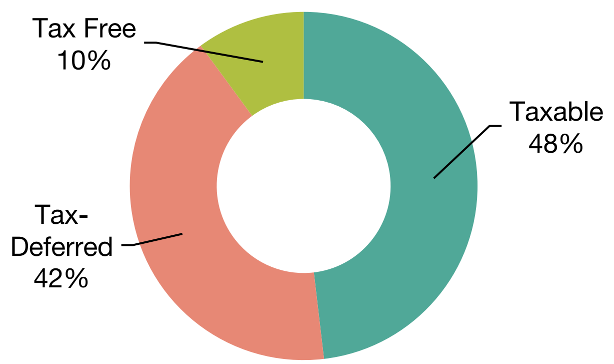
NET WORTH SNAPSHOT



CASH-FLOW SUMMARY



INVESTMENT ASSET LOCATION



Marginal/Average Federal Tax Rate: 24%/10.9%

VISION OF YOUR FUTURE

- Envisioning what potentially reaching your goals, financial independence and/or retirement will look like for you.
- Imagining how reaching those goals will feel.
- Imagining what each day will entail and how that life will look different from today.

GOAL STATUS

Goal	Status
Your personalized goal and how close you are to achieving it	Behind
Your personalized goal and how close you are to achieving it	Started
Your personalized goal and how close you are to achieving it	On track

ACTION ITEMS (NOW)*

→ **Your personalized action item** to accomplish this week.
→ **Your personalized action item** to accomplish this quarter.
→ **Your personalized action item** to accomplish this year.

ACTION ITEMS (FUTURE)*

→ **Your personalized action item** to keep on your radar for the long-term.
→ **Your personalized action item** to keep on your radar for the long-term.

* See financial action plan for specific details

HAPPY FAMILY FINANCIAL ACTION PLAN

<table>
<tr><th colspan="2">Cash Flow and Debt Management</th></tr>
<tr><td>Take Action</td><td>Target Date</td></tr>
<tr><td>Your personalized cash flow and debt management advice
Recommendation
Recommendation</td><td>Date by which to take action</td></tr>
<tr><th colspan="2">Tax Planning</th></tr>
<tr><td>Take Action</td><td>Target Date</td></tr>
<tr><td>Your personalized tax planning advice
Recommendation
Recommendation</td><td>Date by which to take action</td></tr>
<tr><th colspan="2">Employer or Small Business Benefits Review</th></tr>
<tr><td>Take Action</td><td>Target Date</td></tr>
<tr><td>Your personalized employer or small business benefits advice
Recommendation
Recommendation</td><td>Date by which to take action</td></tr>
<tr><th colspan="2">Small Business Analysis</th></tr>
<tr><td>Take Action</td><td>Target Date</td></tr>
<tr><td>Your personalized small business analysis
Recommendation
Recommendation</td><td>Date by which to take action</td></tr>
<tr><th colspan="2">Investment Asset Alignment</th></tr>
<tr><td>Take Action</td><td>Target Date</td></tr>
<tr><td>Your personalized investment asset alignment advice
Recommendation
Recommendation</td><td>Date by which to take action</td></tr>
<tr><th colspan="2">Retirement Planning</th></tr>
<tr><td>Take Action</td><td>Target Date</td></tr>
<tr><td>Your personalized retirement planning advice
Recommendation
Recommendation</td><td>Date by which to take action</td></tr>
<tr><th colspan="2">Insurance and Estate Planning</th></tr>
<tr><td>Take Action</td><td>Target Date</td></tr>
<tr><td>Your personalized insurance and estate planning advice
Recommendation
Recommendation</td><td>Date by which to take action</td></tr>
<tr><td colspan="2">Tips: Useful tips and more specific information about your personalized recommendations</td></tr>
</table>

HAPPY FAMILY FINANCIAL PLANNING EXPERIENCE CHECKLIST

Planning Topic	Plan Deliverables	Date Completed
ENGAGE & EXPLORE		
Concerns	Documented in plan summary	Date
Values	Documented in plan summary	Date
Goals	Documented in MoneyGuide plan	Date
Current Financial Situation	Documented in MoneyGuide plan	Date
CLARIFY & PLAN		
Current and Future Cash Flow Plans	Created cash flow spreadsheet in Excel	Date
Identify Concerns and Expectations for Retirement	Documented in MoneyGuide plan	Date
Risk Tolerance	Documented on Discovery worksheet and in MoneyGuide plan	Date
Tax Planning Projection	Documented in tax planning and tax projection reports from Holistiplan	Date
Retirement Projection	Monte Carlo analysis in MoneyGuide	Date
Social Security Age, Real Estate and Other Financial Decisions	Modeled alternate scenarios in MoneyGuide	Date
Model Long-Term Care Costs	Ran as part of “What Are You Afraid Of” in MoneyGuide plan	Date
ENVISION & TAKE ACTION		
Portfolio Review	Reviewed asset allocations and retirement income planning	Date
Portfolio Recommendations	Reviewed income plan, investment options and/or investment proposal	Date
Insurance Needs & Recommendations	Reviewed insurance analysis and insurance illustrations	Date
Tax Planning Recommendations	Reviewed current tax analysis and tax projection report	
Estate Needs + Recommendations	Reviewed estate documents	Date
PLAN DELIVERY		
Financial Action Plan and Recommendations	Delivered plan summary, financial action plan and reports in financial life organizer (FLO) binder with data templates	Date
Key Partners and Emergency Contacts	Provided introductions as necessary and documented in CRM system	Date

Written by: Michelle Francis, Financial Planner | Life Story Financial | www.lifestoryfp.com
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