

STEP 1:

IDENTIFY



QUANTIFY



PRIORITIZE YOUR
GOALS



IDENTIFY

WHAT DO YOU WANT FOR YOURSELF? THINK WITH THE END IN MIND.



COMMON FINANCIAL GOALS
INCLUDE:

4 Purchasing a Home



5 Starting a Family



6 Starting an entrepreneurial
business venture



7 Reaching Financial
Independence



QUANTIFY

EACH GOAL BY VALUE AND TIME.

FOR EXAMPLE:
HOW MUCH WILL THAT HOUSE COST, AND WHEN
DO YOU WANT TO BUY IT?



MAYBE IT'S A \$360,000 HOUSE IN FOUR
YEARS?
WRITE IT DOWN.

PRIORITIZE YOUR GOALS

WHAT GOALS COME FIRST?

Goal priority helps you determine where
to put your first and last dollar of
savings.



If you identified \$1,000/month for savings and have three
different goals to save for, would you sacrifice one goal
to accomplish another goal faster?



STEP 2:

SOLID FINANCIAL FOUNDATIONS START WITH CASH FLOW



BECOME A MASTER OF CASH FLOW

UNDERSTAND WHAT'S COMING IN AND WHAT'S GOING OUT EACH MONTH.



Creating budget will help to
define your current lifestyle and
identify savings.

CASH FLOW TAKES TIME TO MASTER.

Give yourself three to six
months to see if you can
meet your budget.



If your expenses don't average out
over that time period, reassess
your budget and goals.



Be honest with yourself.
Life happens.

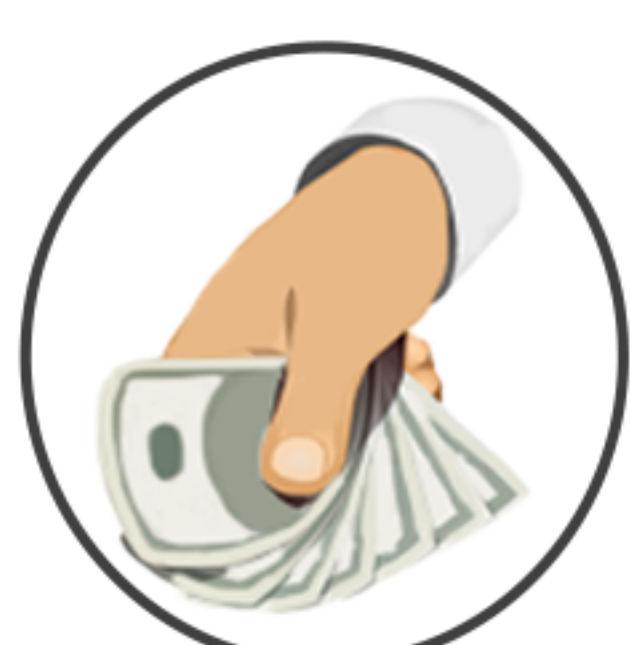


STEP 3:

EMPOWER YOURSELF WITH PERSONAL FINANCE



FAMILIARIZE YOURSELF WITH KEY FINANCIAL PLANNING TOPICS AND CONCEPTS



INTEREST AND
DEBT REPAYMENT



TIME VALUE
OF MONEY



INVESTMENTS



TAXES



ESTATE
PLANNING



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