# 7 Things Your Financial Plan Should Include

# ESTATE PLANNING

Doing this now can save a lot of heartache in the future.

# EDUCATION PLANNING

Start planning for the cost of your own education or for that of your children.

# T

# FINANCIAL HEALTH

May include details such as your net worth, your budget, and cash flow.

#### TAXES

Financial planners use this section to shrink your tax burden so you have more money left over to reach your goals.



# RISK

Hidden dangers that could prevent you from reaching your goals.

# RETIREMENT

Are you saving enough to reach your retirement spending goals? How much do you need to retire?

#### INVESTMENT

Portfolio performance and topics such as risk, reward, correlation, stress tests, etc.

3

# **Prepare Your Own Financial Plan**

**Yi-Tong Ma** 

**Prepare Your Own Financial Plan:** 

Uncover the mysteries within Explore with is enigmatic creation, Discover the Intrigue in **Prepare Your Own Financial Plan**. This downloadable ebook, shrouded in suspense, is available in a PDF format (\*). Dive into a world of uncertainty and anticipation. Download now to unravel the secrets hidden within the pages.

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