The Ways To Wealth’s One-Page Financial Plan

Step #1
Set Your Financial Values

When I look back on my life many years from now, which financial values will I regret most not prioritizing?

Step #2
Calculate Your Net Worth

Current Assets:

Current Liability:

Current Net Worth:

Step #3
Analyze Your Spending

Fill in the pie chart with your three-month average spending on needs, wants, and savings.

Example:

- Needs: 50%
- Savings: 20%
- Wants: 30%

Current:

Step #4
Choose Your Financial Goals

Choose up to three financial goals that excite you (rating at least 9 out of 10 in excitement), give them inspiring names, and set clear deadlines.

1:

2:

3:

Create Cash Flow Plan

What I Will Track

Choose 1-3 financial KPIs to track and measure your progress towards specific goals effectively, emphasizing target achievements and timelines.

1:

2:

3: