

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

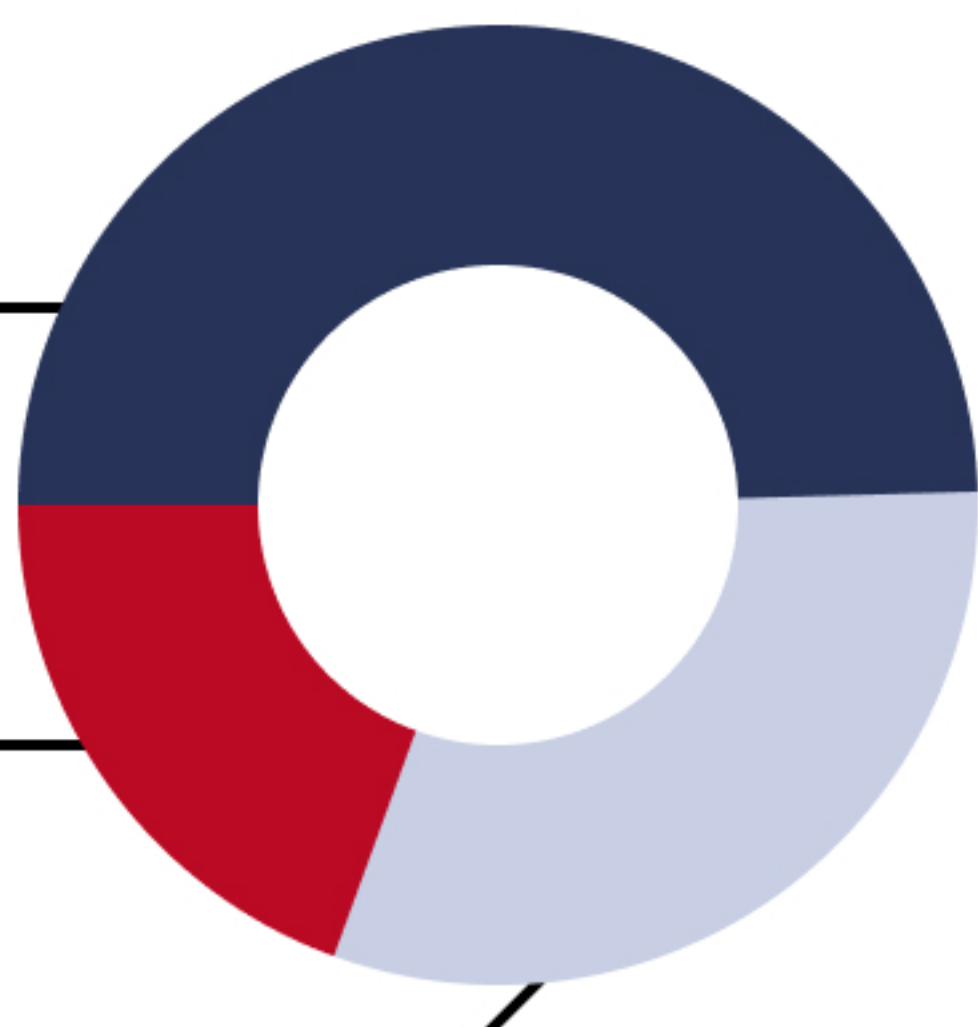
Fill in the pie chart with your three-month average spending on needs, wants, and savings.

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



Automatic
Transfers

1:

2:

3:

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: