

FINANCIAL GOALS AND ACTION PLAN

GOALS	Goal Date	Done
1 Establish Emergency Fund: \$1,500		
2 Eliminate Auto Loans		
2a Payoff Auto Loan #1 \$3,200		
2b Payoff Auto Loan #2 \$4,000		
3 Eliminate credit card debt		
3a Mastercard 1: \$4,400		
3b Visa 1: \$9,000		
4 Increase Emergency Fund to \$4,000		
5 Pay off Student Loan: \$4,900		
5 Save down payment for house - 10%		
6 Start retirement fund & contribute 8% to start		
7 Increase Emergency Fund to 3 months expenses		
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ACTION PLAN
1 Reduce expenses by at least 15% - \$780/month
2 Pay off consumer debt
3 Get life insurance on Bob
4 Get wills done
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