

# Build your Financial House

Spending Plan: Budget

- Identify and eliminate wasteful spending
- Free up money for Financial Plan

<b>'Other':</b>		College Fund Vacation Savings Goals & Dreams
300,000 inc. protection. \$50/mo		\$345,000 accumulated
35 @ \$150/mo		65
Invest \$100/mo in Mutual Fund		Replaced insurance need
<b>Retirement</b>	Mutual Funds IRA's (Roth)	<b>Debt Elimination</b>
<b>Emergency Fund</b>		\$2,000
<b>Income Protection</b> (life insurance)		Term only Inexpensive Budget-friendly Fully-insured
Insurance at job / Cash Value-based / Accidental		

- Identify and eliminate wasteful spending
  - Free up money for Financial Plan

# College Fund Vacation Savings Goals & Dreams

\$345,000 accumulated

65

## Replaced insurance need

Mutual Funds  
IRA's (Roth)

## Emergency Fund

\$2,000

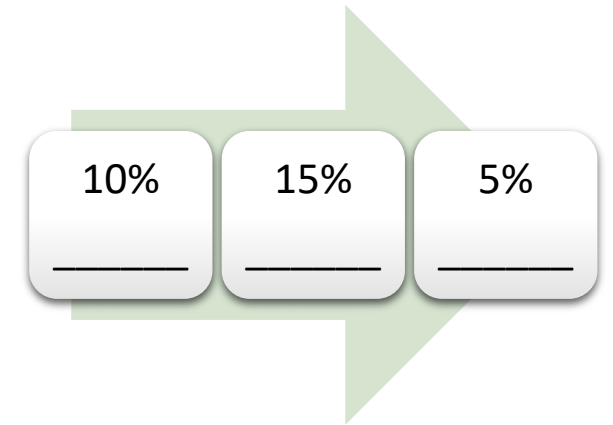
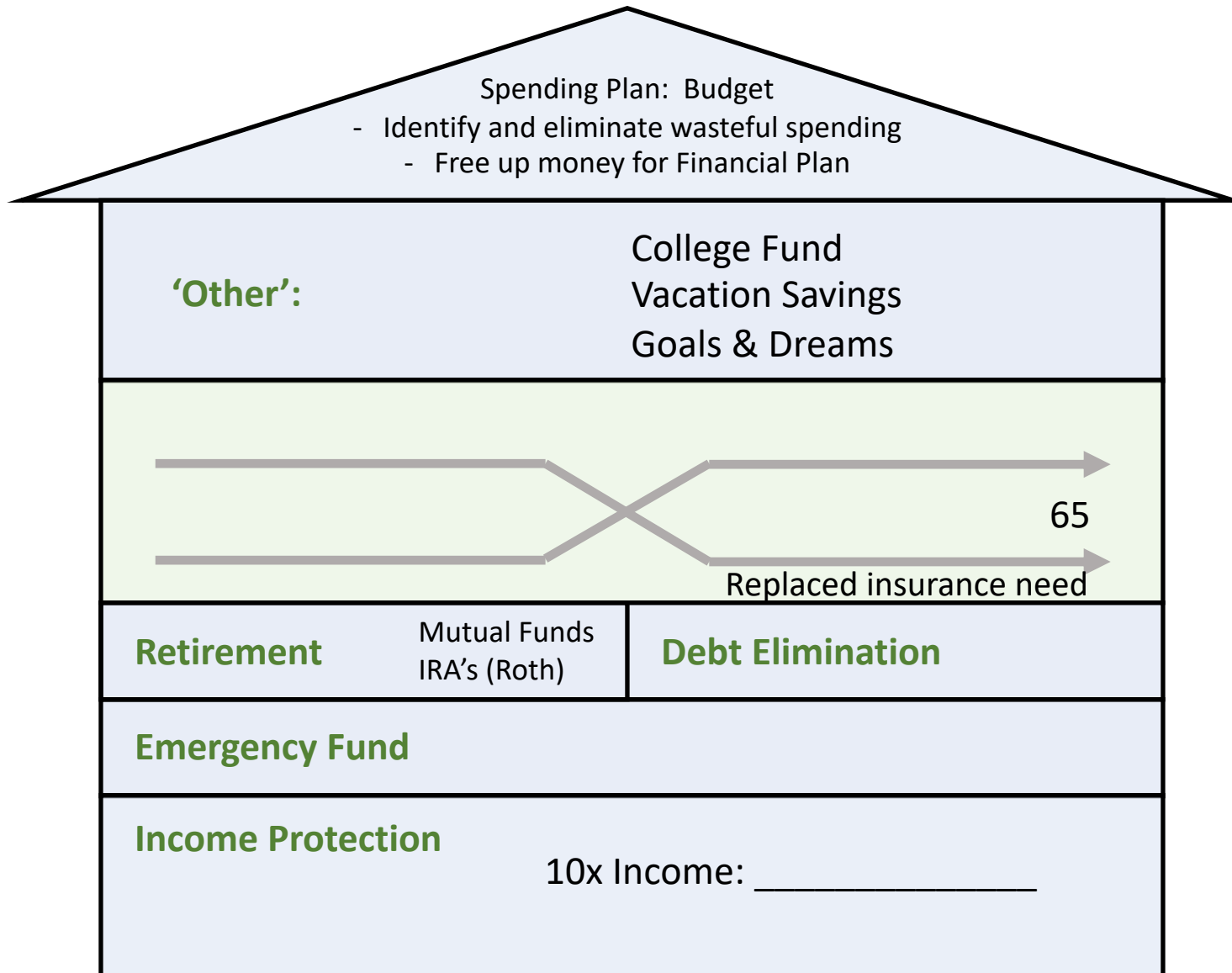
## Income Protection (life insurance)

Term only

Insurance at job / Cash Value-based / Accidental

Inexpensive  
Budget-friendly  
Fully-insured

# Build your Financial House



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