**YOUR PERSONAL FINANCIAL ORGANIZER**

**A close up of a calculator

Description automatically generated**

Helping You Manage Your Significant Life Events

**CLIENT NAME**

**DATE**

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| Dollar**DAILY LIVING**  *Allowing you to focus on enjoying life day by day* | **Date Last Reviewed** |
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| Business Growth**CURRENT SAVINGS**  *Managing your money to help you achieve all of your goal* | **Date Last Reviewed** |
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| Road**TO AND THROUGH RETIREMENT**  *Guiding you to & through retirement* | **Date Last Reviewed** |
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| **Family with two childrenCARING FOR OTHERS**  *Taking care of those who depend on you* | **Date Last Reviewed** |
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| Bullseye**TAX PLANNING STRATEGY**  *Helping you keep more of your money* | **Date Last Reviewed** |
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| **House**  **FAMILY SECURITY**  *Providing security & comport to you and your family* | **Date Last Reviewed** |
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| Leaf**LEAVING YOUR LEGACY**  *Leave a legacy for the people and causes you care most about* | **Date Last Reviewed** |
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| Boardroom  **BUSINESS PLANNING & SUCCESSION**  *Allowing you to focus on enjoying life day by day* | **Date Last Reviewed** |
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