



Financial planning is a thought process, based on what each of us considers most important. What do we want to achieve in life? What do we want to be, do, and have? A financial plan helps us identify the end result we want, figure out how to get there, and stay on track to achieve it.

Goal setting is the foundation of the financial planning process. Goals are accomplished by applying the ongoing five-step financial planning process.

THE FIVE STEP FINANCIAL PLANNING PROCESS



Source: NEFE High School Planning Program

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