



# THE FINANCIAL PLANNING PROCESS

A Master Class for Emerging Millionaires

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Woodson  
Wealth  
Management

What  
Does  
*Your*  
Financial  
Plan  
Look  
Like?

**Describe the future you want for you and your family**

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**What needs to be in place to have that future?**

- 1.
- 2.
- 3.

**What gets in the way of your saving, tick all that apply to you. What else comes to mind?**

- I want to go out and do things.
- Having a shopping addiction.
- Not having a goal to work towards.
- Believing you will never have a million dollars.
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



**How much money would you need to save and invest monthly to have a Million dollars to retire on?**

\_\_\_\_\_ Rate of Return x \_\_\_\_\_ per month x \_\_\_\_\_ Years

**Is it advisable to start investing early? Yes No**

**Why or why not?** \_\_\_\_\_

**What are the five strategies for planning for the unexpected?**

- 1.
- 2.
- 3.
- 4.
- 5.

**Download your copy of The Financial Planning Checklist**

It has the steps to put in place to set you up for a bright future. The future you picture yourself having.

**Book your strategy session with Jamie** to get help with anything you aren't certain how to put in place.

# Your Key Takeaway from Today

We covered a lot over the course of the last 4 weeks, and I don't want you to be overwhelmed. As you tick off each item on your Financial Planning Checklist you can begin to worry less and take simple steps to secure the future you want.

## The One Action Step to Implement After Today is...

Revisit your previous workbooks. Identify your top one or two action items, and your questions around them. Bring them to your strategy session so we can review together, and work on a roadmap to help you complete them.

## The One Question I Want You to Ask Yourself Today is...

Can I have the future I want without planning for it?

We are always here to help.



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