

# Financial Planning Life Cycle

You can do anything, but not everything and not at the same time. What are your Financial Planning Priorities at this stage of life?

19 Cards · 6 Minutes

What are your financial planning priorities? Take a moment and consider these planning topics and sort them based on their priority and timeline in your life.

What are your higher, near-term priorities? What is more important Soon, Later, or Not Me? Simply drag and drop each card to the proper location as you see fit. This will help us focus on your more pressing priorities.

Peace of Mind

Having peace of mind about my life and my money matters

Resource Stewardship

Taking good care of my resources, including assets, the money I own or use

Wealth Building

Working hard, growing my net worth

NOW - HIGHEST PRIORITY  
3 of 3

Career Enhancement

Lifestyle Income Planning

Maintaining My Health

SOON - WITHIN 1-3 YEARS  
4 of 4

Building the Nest Egg

Homemaking

Leisure Time with Loved Ones

Meaningful Life Activities

LATER - IMPORTANT, BUT NOT URGENT  
5 of 6

Baby on Board

Dreams and Ambitions

Manage Debts or Liabilities

Proper Estate and Legacy Planning

Protecting Assets or Income

LESS IMPORTANT OR NOT FOR ME  
4 of 10

Adventure and Exploration

College Planning

Giving and Sharing

Understanding My Investments



SM Sarah Martin



23 Cards · 11 Minutes

### Financial Planning Life Cycle With a Fairly Long Title

You can do anything, but not everything and not at the same time. What are your Financial Planning Priorities at this stage of life?

The following category is now full:  
Now – Highest Priority 3/3

Which item(s) would you like to move back to the stack?

- × **Dreams and Ambitions:** Want to start a business, travel, or buy a new home? How do I get there?
- × **Adventure and Exploration:** Finding that next great adventure; exploring the world at large
- × **College Planning:** Providing a quality college education for my children and other loved ones.

Done! **Building the Nest Egg** was moved back to the stack.

For each topic on the left,  
choose the best matching option on the right:

Dreams and Ambitions

Want to start a business, travel, or buy a new home? How do I get there?

19/23

Categories

Now – Highest Priority	1 / 3	⚙
Soon – Within 1-3 Years	2 / 4	⚙
Later – Not Urgent	1 / 6	⚙
Never – Not for Me	3 / 10	⚙

