

# Financial Plan Summary

## Bill and Sue Client

As of 23 August 2021

### Statement of Financial Purpose

Flexibility to live, work, travel and recreate wherever we want to. The freedom to say 'YES!' or no to opportunities. Be generous with resources (time, talent, treasure) when we can make a difference in our community.

### Goals (order of importance)

1. Secure retirement income supporting time with family and ability to travel
2. Fund 80% of children's college costs starting in 2025 & 2029 with savings and GI Bill
3. Take a family trip every year
4. Give generously to support causes and charities we believe in

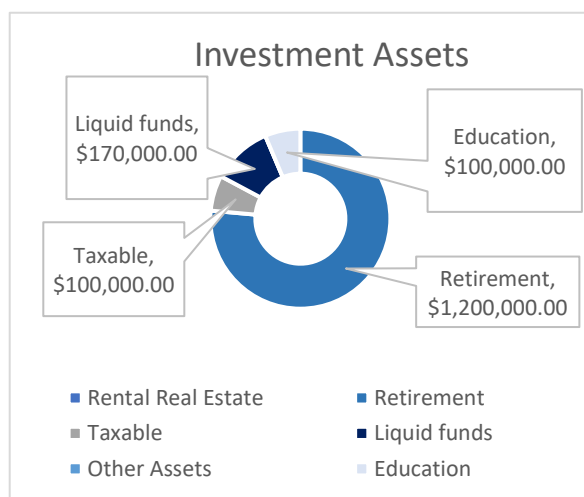
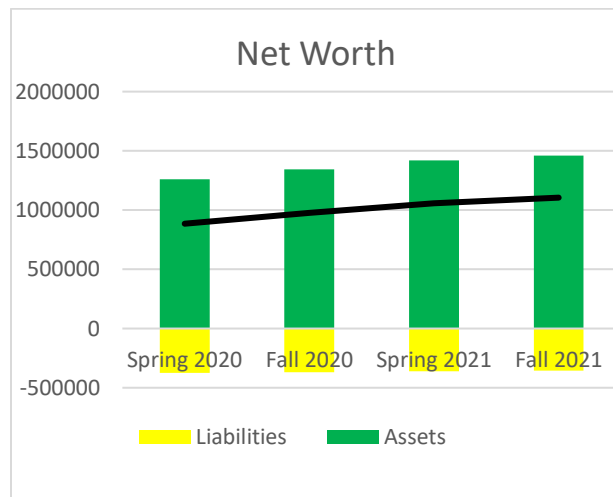
### Next 90 Days

1. Rollover old 401K to new account
2. Put umbrella insurance policy in place
3. Increase 529 funding by \$150 per month
4. Complete tax projections for end of year opportunities

### Who's Action

Joint  
Client  
Client  
Advisor

### Where we are





**Next Mission Financial Planning**  
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## **Accomplishments**

1. Organized financial documents
2. Created will and initial estate planning documents
3. Rebalanced Thrift Savings Plan account to target allocations

## **Goals Met**

1. Took annual trip in 2018, 2019, 2021
2. Increased charitable giving to 5% of income