

20 FINANCIAL 20 PLAN

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MY INTENT FOR MY 2020 FINANCIAL PLAN IS:

MONTHLY ACTION STEPS

JANUARY ☐ _____
FEBRUARY ☐ _____
MARCH ☐ _____
APRIL ☐ _____
MAY ☐ _____
JUNE ☐ _____

JULY ☐ _____
AUGUST ☐ _____
SEPTEMBER ☐ _____
OCTOBER ☐ _____
NOVEMBER ☐ _____
DECEMBER ☐ _____

2020 GOALS AND PROCEDURES

My **2020 Savings Goal** is _____
_____.

I will achieve this by saving \$_____/month.

I will have savings set aside for _____,
_____, and _____.

My **2020 Debt Payment Goal** is _____
_____.

I will achieve this by paying off \$_____/month.

My **2020 Investing Goal** is _____
_____.

I will achieve this by investing \$_____/month.

I will invest in _____, _____,
_____, and _____.

If the stock/bond market drops by ____%, I will
respond by _____.

If the stock/bond market rises by ____%, I will
respond by _____.

If the housing market starts to drop, I will respond
by _____.

If the housing market starts to rise, I will respond
by _____.

IMPORTANT NOTES

MY 2020 MONEY PHILOSOPHY

