*Statement of Financial Purpose*

**Spend time with family, mainly outside, and serve in the community.**

| *Goals (what we’re trying to do)* | *Started* | *Done* |
| --- | --- | --- |
| Fund children’s education account | Jun ‘20 | Dec ‘21 |
| Fully fund retirement accounts | Jun ‘22 | — |
| Pay off mortgage entirely | Jun ‘25 | — |
| — | — | — |
| — | — | — |

| *Next actions (ordered by importance)* | *Implementation* |
| --- | --- |
| ~~Refinance mortgage to x over x~~ | Immediate |
| ~~Get life insurance in place~~ | Immediate |
| ~~Set up digital portfolio~~ | Immediate |
| Scale up to $2,500 saved/mo | 90 days |
| Add $10,000 to Ruby’s college fund | 90 days |
| — |  |

*Estimated Planning Fee: $2,500-$3,500*