

ONE PAGE FINANCIAL PLAN

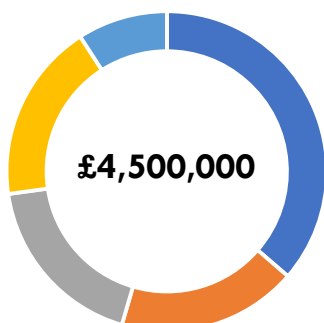


Mr & Mrs Longhurst - March 2020

KEY GOALS PLAN

- To build wealth for our family's future
- To enjoy my work
- To spend more time travelling
- To keep on top of our expenditure
- Spend more time with the children
- Turn off our mobile phones

NET WORTH



ASSETS & LIABILITIES

- **£2,000,000 Property**
- **£1,000,000 Investments**
- **£1,000,000 Pensions**
- **£1,000,000 Cash**
- **£500,000 Mortgage**

INCOME & EXPENDITURE

+ £15,000 net income pm
- £12,000 total expenditure

OVERVIEW

You are in a financially strong position, with a clear focus on building your private wealth. You need to maintain your focus on saving each month and checking your expenditure. Once you achieve financial independence you want to explore working in the charitable sector.

HOW WILL I ACHIEVE MY KEY GOALS?

- Maintain monthly saving
- Utilise tax allowances each year
- Re-invest excess income
- Regularly check expenditure
- Spend money on things that bring you happiness and value
- Continue to remain disciplined
- Block out additional 'family time' in your diaries
- Speak to Sian about next year's travel ideas