

One-Page Financial Plan Template

1. Your WHY

What does financial freedom mean to you? Write one sentence that captures your purpose—why money matters and what it's for.

→ I want to achieve financial freedom so I can _____

2. Where You Are Today

Summarize your current financial picture—this gives you a clear starting point.

Assets	Liabilities	Insurance / Estate
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. Your Top 3–5 Financial Goals

List the most important goals that align with your WHY. Include a target date and measurable outcome.

Goal	Target Date	Success Looks Like
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

4. Next 90-Day Action Steps

What can you do in the next 90 days to move closer to your goals? List specific, measurable actions.

Action Step	Linked Goal	Due Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Review Rhythm

Establish how often you'll review this plan and update it as life changes.

- ☐ Quarterly Review – update balances, review goals, and track progress.
- ☐ Annual Review – revisit your WHY and long-term goals.

F5 Financial Planning | Achieve Financial Freedom for Personal Significance

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