



# CONDITIONOMICS DASHBOARD™

## GOALS & FOCUS FACTORS

NAME(S)



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### GOALS

Six most important goals to be achieved
1
2
3
4
5
6

### GOAL BELIEVABILITY FACTORS

PERSONAL LIFE	
Confidence	Uncertainty
PROFESSIONAL LIFE	
Confidence	Uncertainty
FINANCIAL LIFE	
Confidence	Uncertainty

### ISSUES & CONCERNS

Things that need to be better prepared for:

### PRIORITIES

Three most important things to focus on this year:
1
2
3



# CONDITIONOMICS DASHBOARD™

## PRESENT FINANCIAL PLAN

NAME(S)



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### INCOME & INVESTMENTS

#### Annual Income

Self	\$	\$
Spouse/ Partner	\$	\$
	Salary	Other

#### Investments (excluding retirement accounts)

Stock Market	\$	\$
Real Estate	\$	\$
Private Equity	\$	\$
Perm Life Ins	\$	\$
	Annual Input	Current Value

### SAVINGS & DEBT

#### Children Savings Accounts

For \_\_\_\_\_ (#) children, for \_\_\_\_\_:

\$	\$
Annual Input	Current Value

#### Retirement Savings Accounts

Self	\$	\$
Spouse/ Partner	\$	\$
	Annual Contribution	Current Value

#### Debt

Mortgage	\$	\$
Other	\$	\$
	Annual Payments	Current Balance

### PROTECTION

#### Life Insurance Death Benefit

Self	\$	\$
Spouse/ Partner	\$	\$
	Term	Permanent

(Y/N) Wills \_\_ Guardians \_\_ Last reviewed: \_\_\_\_\_

#### Long-term Disability Insurance

Disability income per month until \_\_\_\_\_:

Group	\$	\$
Individual	\$	\$
	Self	Spouse/Partner

#### Long-term Care Insurance

If my spouse/partner or I developed a chronic or terminal illness, we would receive the following cash amount for long-term healthcare, until \_\_\_\_\_:

Daily	\$	\$
Cumulative Maximum	\$	\$
	Self	Spouse/Partner

#### Liability Insurance

Maximum personal liability protection in the event of an accident:

Automobile	\$
Home Owners	\$
Umbrella	\$