

Personal Financial Plan Template

1. Personal Information

Full Name

Business Name

Contact Information

Date

2. Financial Goals

Short Term Goals (1-2 years)

Long Term Goals (3-5 years+)

3. Personal Net Worth Statement

Assets

Cash & Savings

Investments (Stocks, Bonds, etc.)

Property (Home, Vehicles, etc.)

Other Assets

Amount

Liabilities

Loans (Personal, Business, Student)

Amount

Credit Cards

Amount Owed

Other Liabilities

Amount Owed

4. Income Sources

Business Income (monthly)

Amount

Other Income (monthly)

Amount

5. Expenses Overview (Monthly)

Personal Expenses

Amount

Business Expenses

Amount

Other Expenses

Amount

6. Risk Management & Insurance

Personal Insurance (Health, Life, Disability)

Type / Coverage

Business Insurance

Type / Coverage

7. Retirement Planning

Current Retirement Savings

e.g., IRA, 401k amount

Retirement Goal

Target amount / Age

8. Action Plan

Steps to Achieve Financial Goals

List key action steps...

Advisor Notes / Additional Remarks

Optional...
