

FINANCIAL PURPOSE

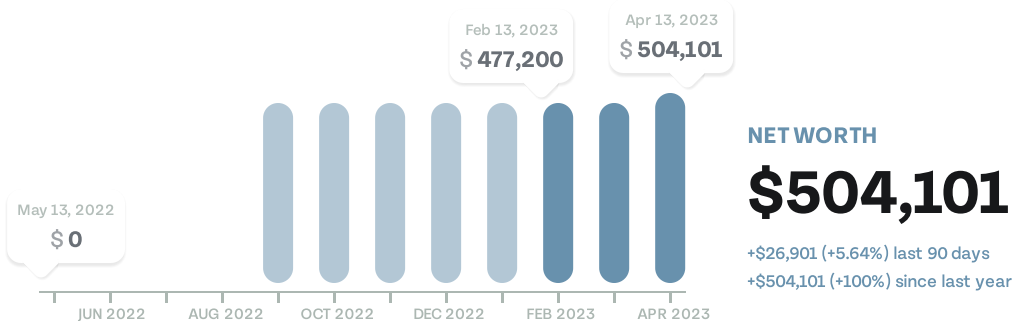
To be able to have adventures with our kids while they're young

GOALS

1. Buy minivan
2. Annual vacation

NEXT STEPS

- Review prior 3 months spending to get a more accurate number and determine car affordability
- Open separate savings for annual vacation
- Get life insurance quotes for both Jane & John
- Review investments



CURRENT ANNUAL INCOME

\$220,000

ESTIMATED ANNUAL SPENDING

\$125,400

