Jane & John Doe

One Page Plan April 13, 2023



FINANCIAL PURPOSE

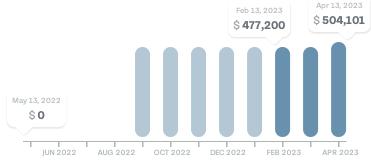
To be able to have adventures with our kids while they're young

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



\$504,101

+\$26,901 (+5.64%) last 90 days

+\$504,101 (+100%) since last year

CURRENT ANNUAL INCOME

\$220,000

ESTIMATED ANNUAL SPENDING

\$125,400



Elements

This tool is only intended to illustrate mathematical principles and is not intended to portray investment performance of any particular product or strategy. If you have any questions regarding tax related issues, you should consult a qualified tax professional.

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