

# 20 FINANCIAL 21 PLAN

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## MONTHLY ACTION STEPS

January  \_\_\_\_\_  
February  \_\_\_\_\_  
March  \_\_\_\_\_  
April  \_\_\_\_\_  
May  \_\_\_\_\_  
June  \_\_\_\_\_

July  \_\_\_\_\_  
August  \_\_\_\_\_  
September  \_\_\_\_\_  
October  \_\_\_\_\_  
November  \_\_\_\_\_  
December  \_\_\_\_\_

## MY 2021 GOALS AND ACTIONS

My **2020 Savings Goal** is \_\_\_\_\_

\_\_\_\_\_

I will achieve this by saving \$ \_\_\_\_ /month.

I will have savings set aside for \_\_\_\_\_,  
\_\_\_\_\_, and \_\_\_\_\_.

My **2020 Debt Payment Goal** is \_\_\_\_\_

\_\_\_\_\_

I will achieve this by paying off \$\_\_\_\_/month.

If I get a windfall I will \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_.  
*(inheritance, bonus, stimulus check)*

My **2020 Investing Goal** is \_\_\_\_\_

\_\_\_\_\_.

I will achieve this by investing \$ \_\_\_\_/month.

I will invest in \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.

If the stock/bond market drops by \_\_\_\_\_%,

I will respond by \_\_\_\_\_.

If the stock/bond market rises by \_\_\_\_\_%,

I will respond by \_\_\_\_\_.

If the housing market starts to drop, I will

respond by \_\_\_\_\_.

If the housing market starts to rise, I will

respond by \_\_\_\_\_.

## MY 2021 MONEY PHILOSOPHY