

2023 FINANCIAL PLAN

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MONTHLY ACTION STEPS

January _____
February _____
March _____
April _____
May _____
June _____

July _____
August _____
September _____
October _____
November _____
December _____

MY 2023 GOALS AND ACTIONS

My **2023 Savings Goal** is _____

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

I will have savings set aside for _____,
_____, and _____.

My **2023 Debt Payment Goal** is _____

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

My **2023 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 _____.

IMPORTANT NOTES

MY 2023 MONEY PHILOSOPHY

