

SMITH FAMILY FINANCIAL STRATEGY

Start \$2500 Emergency Fund

Date Accomplished: _____

Eliminate Debt

Discover: \$ 1,086
American Express: \$ 3,380
Mastercard: \$ 3,727
Visa Card: \$ 9,574
Car Loan: \$ 29,790
Student Loans: \$ 54,180

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Finish Emergency Fund

Date Accomplished: _____

1 Month Expenses: \$ 3,780
2 Month Expenses: \$ 7,560
3 Month Expenses: \$ 11,339
4 Month Expenses: \$ 15,119
5 Month Expense: \$ 18,899
6 Month Expense: \$ 22,679

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Maximize Retirement Investing

Date Accomplished: _____

Jackson 401(k): \$1,250 annually
Jackson Roth IRA: \$5,500 annually
April 401(k): \$1,250 annually
April Roth IRA: \$5,500 annually

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Date Accomplished: _____

Education Savings

Date Accomplished: _____

Zola: \$ 4,000 annually
Bailee: \$ 4,000 annually

Date Accomplished: _____

Date Accomplished: _____

Pay off house

Date Accomplished: _____

Mortgage \$133,452 total

Date Accomplished: _____

Seek new ways to invest and build wealth.