FFES Course Resource Index

Session 7 - Legacy, Integration and the Freedom Plan | Participant Resource | Version 1.0

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Your seven-session toolbox

Session 1 - Personal snapshot, financial terms, and learning resources.

Session 2 - Cash-flow plan, Budget Leak Audit, emergency-fund plan, and Zero-Based Budget workbook.

Session 3 - Debt Snapshot, debt-stacking plan, and credit-report checklist.

Session 4 - Household protection review, family documents, and beneficiary checklist.

Session 5 - Investing readiness, Rule of 72, and the Three D's.

Session 6 - Retirement readiness, account types, and income sources map.

Session 7 - Personal Freedom Plan, legacy organizer, and 30/90/365 Roadmap.

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