



Personal Freedom Plan

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

Privacy: Keep this resource for your personal use. Do not write account numbers, passwords, Social Security numbers, full birth dates, or other sensitive identifiers.

Financial House Check

Cash flow and emergency savings: ☐ Strong ☐ Developing ☐ Needs attention

Debt and credit: ☐ Strong ☐ Developing ☐ Needs attention

Protection: ☐ Strong ☐ Developing ☐ Needs attention

Saving and investing: ☐ Strong ☐ Developing ☐ Needs attention

Retirement: ☐ Strong ☐ Developing ☐ Needs attention

Legacy and essential documents: ☐ Strong ☐ Developing ☐ Needs attention

Now / Next / Later

NOW: _____

NEXT: _____

LATER: _____

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