CHECKLIST · FINANCIAL MANAGEMENT

FREE PREVIEW

Creating a 5-Year Financial Plan



A 5-year financial plan provides a roadmap to achieve your long-term goals and build financial stability. Use this checklist to design a realistic and actionable plan.

10 steps · Print-ready A4

NAME _____ START _____ TARGET DATE _____

1 Define Your Financial Goals

Write down specific goals you want to achieve in the next five years.

EXAMPLE *"Save $20,000 for a down payment on a house."*

2 Assess Your Current Financial Situation

Review your income, expenses, savings, and debt.

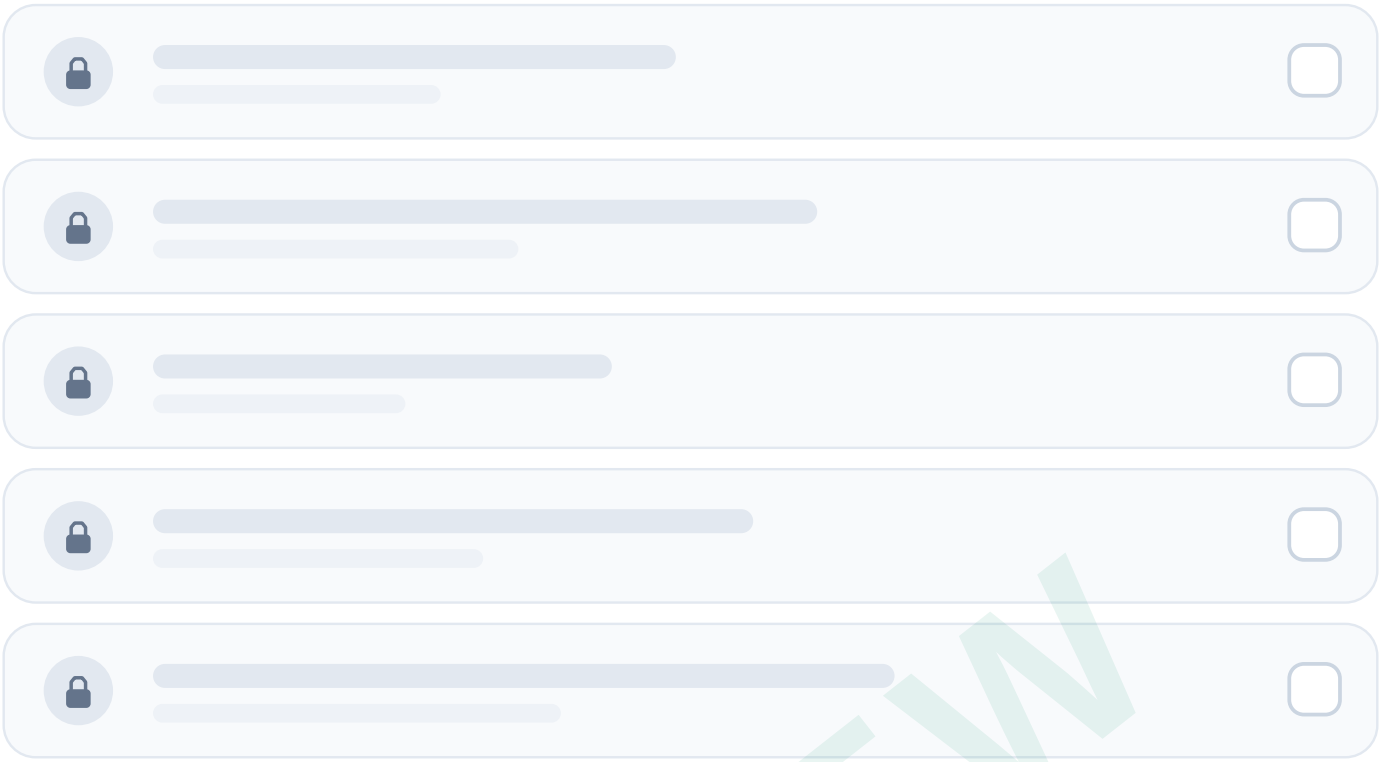
TIP *Use budgeting software to get an overview of your finances.*

3 Prioritize Goals

Rank goals based on importance and feasibility.

EXAMPLE *"Prioritize paying off high-interest debt before saving for a vacation."*

PREVIEW



Like the design?

Get the full version: every step with examples and tips, a reflection page, no watermark.

Get the full version

PREVIEW