

Financial Planning Template

Invest with Clarity. Move with Discipline.

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Financial Snapshot

Monthly Income

Total monthly earnings from all sources.

Monthly Expenses

Your recurring monthly spending.

Savings

Current savings balance.

Debts

List all outstanding debts.

Financial Goals

Short-Term Goals

Goals within the next 12 months.

Mid-Term Goals

Goals within 1–5 years.

Long-Term Goals

Goals beyond 5 years.

Budget & Cash Flow

Budget Plan

How you allocate income (needs, wants, savings).

Savings Plan

Planned monthly contributions to savings.

Debt Management

Debt Strategy

How you plan to reduce or eliminate debt.

Investment Strategy

Investment Plan

Approach to growing your money.

Insurance

Coverage Review

Assess current insurance and gaps.

Real Estate

Real Estate Plan

Interest in buying or investing in property.

Action Plan

Top Priorities

Your top 3 financial focuses.

30-Day Plan

Actions to take in the next 30 days.

90-Day Plan

Actions to take in the next 90 days.

Next Steps

Move forward with clarity and disciplined action.

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