

CLARIFY CASH ~~FLOW~~ PROCESS

STEP 1

KNOW YOUR
ANNUAL SPENDING

STEP 2

PROJECT
SPECIAL
EXPENSES

STEP 3

ADD UP YOUR
5-YEAR
CASH NEEDS

STEP 4

SET THEM
ASIDE IN
SAVINGS

STEP 5

INVEST
THE
REST

REPEAT

RECALCULATE
MONTHLY

- KNOW YOUR LIFESTYLE WILL BE UNAFFECTED BY THE MARKETS FOR AT LEAST 5-YEARS
- SPEND INTENTIONALLY AND WITH JOY
- CREATE A SOLID BASE FOR LIFETIME CASH FLOW PROJECTIONS