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Planning Process. What

is the 6 step Financial

Planning Process? 1.

Define financial goals 2.

Develop financial plans

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and strategies to achieve goals 3. Implement financial plans and strategies 4. Periodically develop and implement budgets to monitor and control progress against goals 5. Use financial statements to evaluate ...

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Define Personal

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Financial Planning

Name the Six Steps of
Financial Planning

Identify Factors that
affect Personal

Financial Decisions

Explain Opportunity

Costs Identify Eight

Strategies for Achieving

Goals. Terms in this set

(21) Values, beliefs and

principles that a person

considers important,

correct, and desirable ...

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STATEMENT OF NET
WORTH ASSETS

(Total Value) Cash on
hand \$ Checking

Accounts \$ Savings

Accounts \$ Certificates

of Deposit \$ Cash Value

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of Life Insurance \$ U.S.

Savings Bonds \$ Mutual

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The TRS Budget

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your advisor – Credit

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Military to Civilian

Transitions for resume

writing. All of the above

documents will be used

for personal use during

various modules of the

workshop.

Required Documents

for Transition

Workshop | Airman ...

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