

Financial Goals Roadmap

Connect today's habits to tomorrow's opportunities.

Pillar: Build

A Build resource for saving, long-term goals, reliable education, and financial progress reviews.

Action Checklist

- ☐ 1. Define one 90-day financial goal.
- ☐ 2. Identify the habit that supports it.
- ☐ 3. Separate savings, investing, insurance, and planning questions.
- ☐ 4. Schedule a quarterly progress review.

Notes

Next Steps

Take the Legacy Ready Assessment. Explore Resources. Explore Financial Bliss Academy. Bring Legacy Ready to Your Organization.

Disclaimer

This resource is provided for general educational and informational purposes only. It does not constitute individualized financial, investment, insurance, tax, estate-planning, or legal advice. Financial and legal circumstances vary. Consult appropriately qualified professionals regarding decisions specific to your circumstances.