

# FUNDING YOUR BIGGER FUTURE<sup>TM</sup>

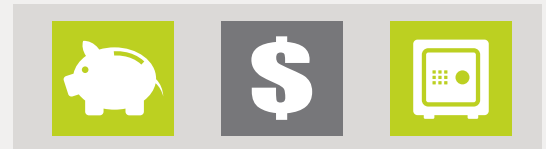


NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

## WHAT'S THE IDEA?

- Set up a fund for different special purposes then add savings to each fund on a regular basis.
- Create a specific investment plan for each fund (with different goals and investment options).
- Create one fund that you don't touch — except in an extreme emergency.
- Allocate your savings based on each fund.



## QUICK BUDGET

EXPENSES	AMOUNT
Home	
Utilities	
Food	
Insurance	
Transportation	
Fun	
Travel	
Real Estate	
Charity/Church	
Misc.	

TOTAL \$ \_\_\_\_\_

ALL MONTHLY INCOME FROM SOURCES \$ \_\_\_\_\_

MONEY AVAILABLE TO ALLOCATE TO FUNDS AND BUCKETS \$ \_\_\_\_\_

**FILL YOUR FUNDS. BUILD YOUR BUCKETS.**

Review your net worth statement and how you visualized your retirement.

Now look at the fund ideas below and pick three or four that you want to start right away.

- Walk Away Fund™
- Get Out of Town Fund
- Grandkids Fund
- College Fund
- Charity Fund
- Great Memories Fund™
- Family Lake Cabin Fund

Write down exactly how you see these funds working for you.

Allocate money to each bucket monthly and use only for the specific needs and fund described.