

Life & Financial Health

Birth

Death Eternity ?

Life Health

Financial Health

SPIRITUAL HEALTH

VOCATIONAL HEALTH

FINANCIAL HEALTH

Income

Savings
(e.g. retired)

Insurances

Lifestyle

Debt

Taxes

Charity

Net Cash Flow*
[Income - Outgo]

ESTATE

[Assets (e.g. House,
investments,
business) - Debts]

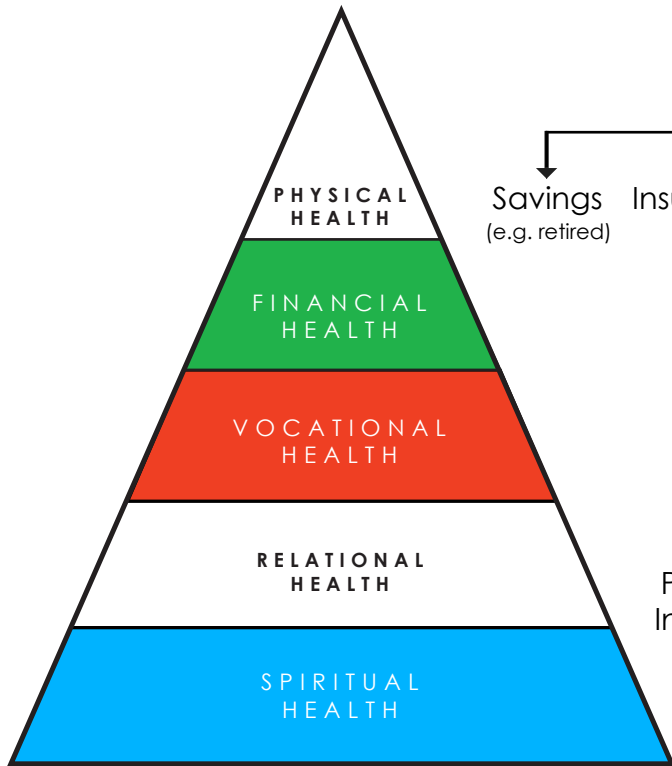
Prepare
Inheritors

Choose
Charities

Create
Wills/Trust
Answering: "If i die
or become
incapacitated today...."

Disburse
Estate

- People
- Charities
- Expenses



Priority Pyramid

* Track monthly cash flow using your bank's financial tools/reports and/or software (e.g. Mint.com, Quicken.com)