## The Financial Planning Hierarchy

Freedom

**Financial Confidence** 

**Pursuing Goals** 

**Managing The Money** 



Accomplishing life's purpose

Leaving a legacy



Take care of a loved one



Organized & control



More discretionary time



Worry less



College



Healthcare



Retirement



**Estate** 



Charity



Money manager selection



...........

**Asset** allocation



**Security** selection



Insurance



Income generation



**Taxes** 



Debt



Cash flow