

# Our Financial Vision:



**Home:** We are happy with our current home and plan to reside there for several years to come. At some point in the future we will be downsizing to a smaller home.



**Income:** We would like to be financially independent. To us financial independence means we would be able to live at the level we have grown accustomed to without needing to work for income. We do not foresee a need to increase our current needs at \$120,000 per year of after tax income.



**Health & Lifestyle:** We want to enjoy the lifestyle we have created for many years to come. We need to build an exercise program into our daily routine.



**Family:** We take great pride in our children. We would like to continue to provide financial support to them so that they may have a head-start as they transition into adulthood.



**Winter vacation:** We would like to have the ability to spend 3 to 4 months annually in a warmer climate, enjoying activities with our friends. This may or may not include the purchase of a vacation property.