

PFFP150B2 - Planning Your Signature Financial Plan Final Project Outline

For this assignment, you'll need to respond to each of the prompts below. You'll then **save a PDF** copy of this Planning Document and **upload it to D2L** under the "Final Project Outline" folder. This assignment is being graded for completion. If you complete this planning document, you will earn 10 points on this assignment. You must complete every prompt in this outline to receive full credit for this assignment.

Note: Do NOT share a link to this google document. You must upload a PDF copy of this planning document.

Assignment Overview: The Final Project in this course, which is also the Signature Assignment, will be the creation of a personalized financial plan.

To help you work through your project, the following exercises will help you organize your ideas and begin work on your plan. Though this isn't a traditional outline, after you complete this planning document, you should have a clear understanding of your next steps as you work on your Final Signature Financial Plan.

Section 1: As you begin to think about Section 1 of your Financial Plan, return to the exercise you completed as part of your self-reflection essay outline where you placed a mark on a spectrum to indicate where you tended to fall.

As a reminder, the exercise looked like this:

Example A	Example B
<hr/>	
X	
(If you're like Example A, you'll tend to.....; If you're like example B, you'll tend to.....)	

Section 1 Perspective: The Individual Consumer

Section 1a: What are your tendencies with money?

After reviewing your tendencies from your Self-Reflection Essay, and completing a semester of projects, narratively describe some of your tendencies and what you know about your personal habits and beliefs about money in the areas of spending, risk, money avoidance, and consumerism values (materialism).

Section 1b: Brainstorm about your career - What are your career ambitions at this time? If you aren't sure, describe in as much detail as you can, what you think you'd like to be doing. (Responses can vary from a very specific career role or accomplishment, to something very general such as "work in a career where I help people").

Section 1c: Brainstorm about your family - Who will you be responsible for in the future? Share any details you can about your family system¹ (or how many people you hope your family might include in the future).

Section 1d: Brainstorm about your home - Where will you live? Share any details you can about the place you'd like to live in the future, or the kind of place you'd like to live in the future (if you don't know an exact place).

Section 1e: Brainstorm about your life - Pick a time XX years in the future – what does your ideal life look like? What is important to you? What values guide your decision-making? What do you hope you've accomplished? How do you hope to spend your time?

For this question, my response is based on my ideal life (XX) years in the future.

¹ What is a family system? In the simplest of terms, a family system is a group of people who make up the same household. [Read more about family systems here.](#)

Section 2 Perspective: The Financial Planner

Section 2a: Pick 3 areas to focus on for your financial plan:

From among the options below, delete the three you are not planning to focus on:

- Budget and cash flow analysis
- Emergency preparedness
- Asset acquisition (vehicles, houses or other large purchases)
- Credit/debt management
- Asset/Identity protection
- Retirement Planning

Section 2b: From the options above, pick one and elaborate on the following:

Which topic are you focusing on here (choose the topic where you will present numerical information in graphical form)?

From the perspective of a financial planner, evaluate where you stand right now (in the planning area selected):

Describe where you want to be in the future:

Write 2 actionable SMART goals² that can help you move from where you are now to where you want to be in the future. Be sure your goals are Specific, Measurable, Attainable/Actionable, Realistic and Time-bound! Try to focus your SMART goals on actions you can take within 5 years.

1. SMART Goal # 1:

2. SMART Goal # 2:

² Here are two sources to help you understand how to write an effective SMART goal. [Khan Academy video](#); [University of California How-to-Guide](#).

Graphical Display - Choose 1 of the following:

- 1) Describe the graphical display you have planned. Share the kind of chart, graph, table or display you intend to create, AND what kind of data you will share in your graphical display. Your graphical display should support the evaluations or description shared above (in the form of a chart, graph, table, or other visual aid).
- 2) If you feel ready, go ahead and create the graphical display of numerical data or information that supports the evaluations or description shared above (this can be in the form of a chart, graph, table, or other visual aid).

Additional [optional] resources for creating your graphical display:

[How to Choose the Right Data Visualization](#)

[How to Choose the Right Graph](#) (5 minute YouTube Video)

[How to Insert Charts on Google Slides](#) (2.5 minute YouTube Video)

Final Deliverable: Download this document as a PDF and submit to the **Planning your Final Project (Project Outline)** folder on D2L.