

Ms. Biz – The Pyramid of Financial Independence



Ms. Biz
with all
the biz
a Ms.
needs
to know in
personal
finances
and in
life.

The Pyramid of Financial Independence

Print Version

NET WORTH \$

(ADD ALL TOTALS)

Goals: _____

Goals: _____

High Risk

\$
\$
\$
\$

Aggressive Inflation Hedge
 Protection Against Double Digit Inflation

Name	Amount
Home Value	\$ <input type="text"/>
Home Mortgage	\$ <input type="text"/>
Other Equity	\$ <input type="text"/>
Total \$ <input type="text"/>	

Inflation Hedge
 Investments to Help Protect Against Normal Inflation

Growth		Income	
Name	Amount	Name	Amount
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Total: \$ <input type="text"/>		Total: \$ <input type="text"/>	

Emergency Reserves
 Liquid Accounts Goal 2 Mos Income

GOAL: \$

Money Market \$

Checking \$

Savings \$

Credit Union \$

Other \$

Total: \$

Foundation Savings
 Guaranteed Funds: Goal Min. 6 Mos Income

GOAL: \$

CDs \$

U S Bonds \$

Other \$

Other \$

Other \$

Total: \$

Risk Management
 Will, Life, Disability, Other Insurance

Will/Living Trust

Disability

Home

Auto

Liability

Life Ins

LTC Ins

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Ms. Biz
can be heard
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1080 KRLD

Saturdays
3-4 PM

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Ms. Biz

Empowering Women in Personal Finance