

# Financial Plan Notes

for

# John and Jane Dow

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## Contents

Priorities.....	1
Plan Overview .....	2
Assumptions.....	3
Citizenship.....	4
Modeled Income .....	4
Social Security & Pensions .....	4
Modeled Expenses .....	4
Baseline Expenses .....	4
Variable Expenses .....	4
Taxes .....	5
Modeled Savings .....	5
Year End Saving/Spending .....	5
Company Benefits.....	5
Health Plan.....	5
HSAs .....	5
DCFSA.....	6
401(k) contributions.....	6
Mega-backdoor Roth .....	6
Backdoor Roth IRA .....	6
Dow Employee Stock Purchase Program .....	6
Legal Plan .....	6
Other Benefits.....	6
Investments.....	6
General.....	6
Beneficiaries.....	7
Taxable (Brokerage) Accounts .....	7
Roth IRAs.....	7
HSAs .....	7
Pre-Tax Accounts .....	8
Pensions .....	8
529s.....	8
Restricted Stock Units (RSUs).....	8

Asset Allocation after Changes ..... 8  
 Emergency Fund ..... 8  
 Additional Cash to Invest ..... 8  
 Other Assets ..... 8  
 Taxation..... 8  
     Roth Conversions ..... 8  
     Tax Gain Harvesting ..... 10  
     Tax Bunching ..... 10  
 Cash Flow ..... 10  
     Retirement Paycheck ..... 10  
     Current Cash Flow ..... 11  
     Bucket Strategy ..... 12  
     Funding Large Variable Expenses..... 12  
 Loans ..... 12  
     401(k) Loans ..... 12  
     Credit Card Loans ..... 12  
     Mortgage and Primary Mortgage Insurance (PMI)..... 13  
     Cars, Boat, Furniture ..... 13  
 Insurance..... 13  
     Auto..... 13  
     Home..... 13  
     Umbrella ..... 14  
     Life Insurance ..... 14  
     Disability..... 14  
 Estate Planning..... 14  
 Possibilities..... 14  
 Action Plan ..... 16

Due to confidentiality a client report cannot be shared, but the Table of Contents does show the areas covered in a Financial Planning engagement. Not all sections will be relevant to all families.