



Case Client(s): Tammy

Age: 33

Occupation: Registered Nurse

Primary Goal: Payoff debt, Get a Financial Plan In Place

Successful early-career professional



Challenges

- Managing her debt
- Build an emergency fund
- Saving for a home down payment
- Contribute to a retirement plan

Benefits one

Confidence on achieving her short & long term financial goals.

Benefits two

Better clarity on building wealth and financial security.

Benefits three

Gained a professional accountability partner.

Approach

Conducted an Initial comprehensive financial review to gain a full insight into her financial situation. Working together, I recommended we develop a customized financial plan to help her prioritize goals and address her debt, with priority given to high-interest debt and reducing unnecessary expenses.

Solutions

I recommended that we pay off her credit card debt and begin making significant progress on her student debt. Furthermore, I emphasized saving for a down payment on a house while starting contributions to her retirement account. With ongoing planning support, Tammy gained the knowledge and confidence she needed to make informed financial decisions and take control of her financial future.

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