

LINDENBERG FINANCIAL INC

The Vision Timeline Tool®

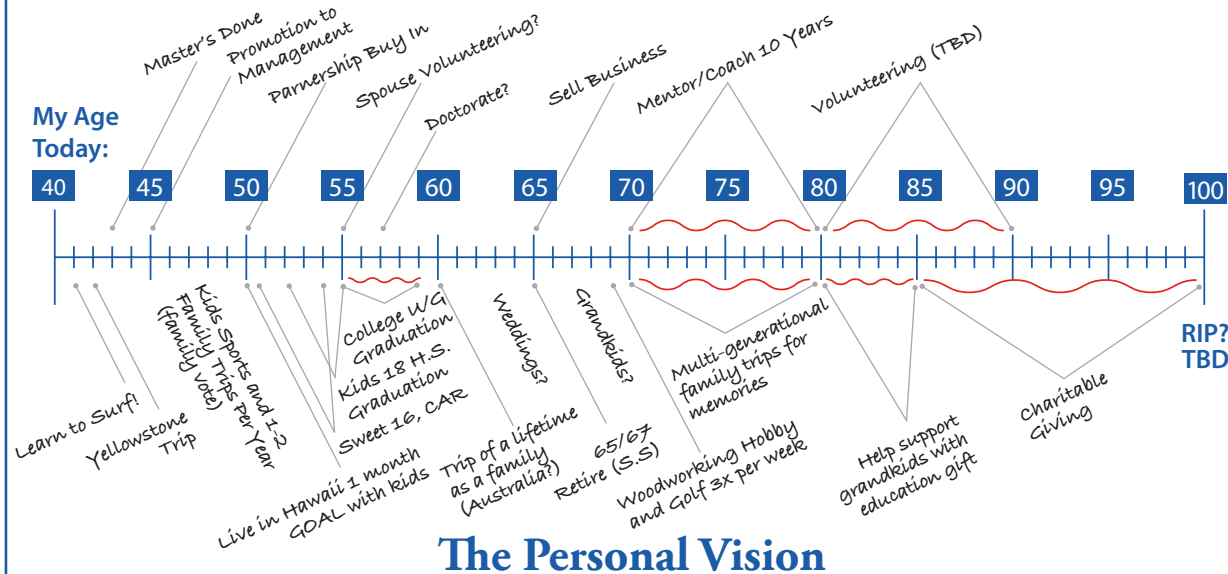
Name _____ Date _____

Looking ahead, the purpose of this tool is to gain clarity and focus on your future. That is refining your vision to start planning your best life!

- Step 1** Write in ages so as to live to an assumed age of 90 or 100.
- Step 2** Start by identifying milestone life events. Examples might include the birth of future children, school ages, anticipated graduations, sweet 16's, retirement(s), career changes, promotions and caring for aging family members.
- Step 3** Focus next on short periods with any trips of a lifetime, planned relocations, etc. We suggest completing your personal goals before professional goals, and spending most of the effort on the next 20 years of your life, rather than the later stages.
- Step 4** Save this somewhere you will find it later, perhaps annually or every couple of years.
- Step 5** **Important!** Align your economic resources and financial plan with guidance from your advisory team.

EXAMPLE

The Professional Vision & Purpose



Securities offered through **Osaic Wealth, Inc.** member FINRA/SIPC. **Osaic Wealth** is separately owned and other entities and/or marketing names, products or services referenced here are independent of **Osaic Wealth**. Insurance services also offered by Lindenberg Financial, Inc.

Office (302) 235-8672 Fax (302) 235-8678 404A East Savannah Rd. Lewes, DE 19958

lindenbergfinancial.com

Please share a copy of this completed Vision Timeline.
Email to cwv@lindenbergfinancial.com

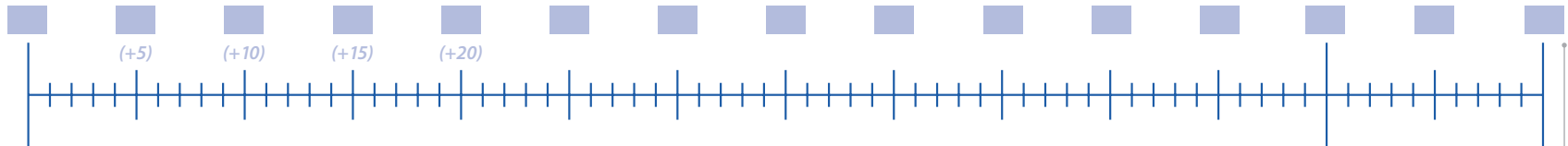
Name _____ Date _____

WE SUGGEST PRINTING AND COMPLETING THIS PAGE BY HAND

The Professional Vision & Purpose

LIST ALL Family Members Ages Today; including living parents and pets:

My Age
Today:



The Personal Vision

RIP?

Securities offered through **Osaic Wealth**, Inc. member FINRA/SIPC. **Osaic Wealth** is separately owned and other entities and/or marketing names, products or services referenced here are independent of **Osaic Wealth**.

Insurance services also offered by Lindenberg Financial, Inc.