



Progress Report: 5 C's of Financial Freedom

Name: _____

Date: _____

Overall Desired Results							
<i>5 C's of Financial Freedom</i>	<i>'Measurable Attributes'</i>	Client (1-5)		Next Steward (1-5)		FA (1-5)	
		2016	2017	2016	2017	2016	2017
<i>Inspiring Lifestyle</i>							
Confidence	<i>...in financial decision-making.</i>						
Consistency	<i>...of behavior over a lifetime.</i>						
Contentment	<i>...under all economic conditions.</i>						
Communication	<i>...excellence at all levels.</i>						
Charity: Maximum Generosity	<i>...of time, talent, and treasure.</i>						
<i>5 C's of Financial Freedom Results</i>	<i>Total Score(s)</i>						

NOTES:

-Information presented is believed to be factual and up-to-date and was obtained from sources known to be reliable. It should not be regarded as a complete analysis of the subjects discussed. All expressions of opinion reflect the judgment of the author as of the date of presentation and are subject to change. Information and the outline presented regarding Personal Finance principles are used with permission from Ronald Blue. In addition, principles regarding Estate and Legacy Planning are taken from Splitting Heirs, by Ronald Blue with Jeremy White.

-Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment will either be suitable or profitable for a client's investment portfolio.

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