

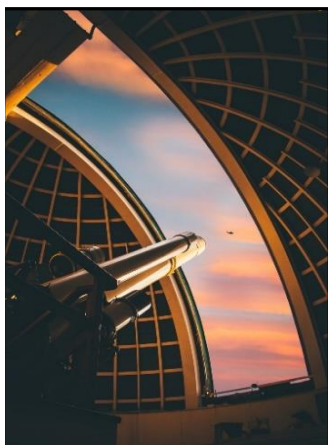
THE ONE PAGE PLAN

Mr John Jay
Mrs Jenny Jay

Date: 20th January 2021



GEORGE SHIPPAM
FINANCIAL PLANNING



THE BIG PICTURE

- 1/ TO RETIRE AT 65 WITH ENOUGH MONEY TO SEE ME OUT
- 2/ TO FUND MY GRANDCHILDREN'S UNIVERSITY EDUCATION
- 3/ TO LEAVE A LEGACY TO MY CHILDREN



STRATEGIC PRIORITIES

- 1/ BUILD CASHFLOW MODEL FOR FUTURE EXPENDITURE
- 2/ FUND PENSION: TARGET £800,000
- 3/ OPEN ACCOUNT/S FOR CHILDREN
- 4/ REVIEW LEGACY PLANNING



ACTION POINTS

- 1/ GEORGE TO BUILD MODEL
- 2/ INCREASE PENSION CONTRIBUTIONS
- 3/ DECIDE ON JISAs VS. GIFT PLANS & AMOUNT

Review Date:

28th February 2021