

**Figure 3**

**Post-Transition Spending Plan (Section 5 of 5) (EXAMPLE-DO NOT USE)**

| CASH FLOW SUMMARY           |        |           |         |
|-----------------------------|--------|-----------|---------|
| TOTAL                       | ACTUAL | PROJECTED | REMARKS |
| Household Gross Income      | \$ -   | \$ -      |         |
| Paycheck Deductions         | \$ -   | \$ -      |         |
| Household Net Income        | \$ -   | \$ -      |         |
| Living Expenses             | \$ -   | \$ -      |         |
| Total Monthly Debt Payments | \$ -   | \$ -      |         |
| Savings & Investments       | \$ -   | \$ -      |         |
| Monthly Surplus or Deficit  | \$ -   | \$ -      |         |

| CURRENT FINANCIAL SITUATION |       |
|-----------------------------|-------|
| Total Debt                  | \$ -  |
| Debt-to-Income Ratio        | 0.00% |
| Total Assets                | \$ -  |
| Net Worth                   | \$ -  |
| Credit Score                |       |
| Notes:                      |       |

| FINANCIAL GOALS                         |  |
|---|--|
| Short-Term Goals<br>(1 month - 1 year): |  |
| Mid-Term Goals<br>(1-5 years):          |  |
| Long-Term Goals<br>(5-10+ years):       |  |
| NOTES:                                  |  |