

Create a Financial Plan – Wrap Up

By this point, you should have made notes about which topics in this lesson apply to you and which don't. You may have added several questions to your list and created your team of professionals.

When it comes to the financial plan, especially the financial dashboard, we strongly recommend that you work with a competent financial planner. The financial planner's combination of sophisticated software, experience, and training are worth the time and effort you will put into finding a professional.

Creating a financial dashboard will give you the ability to make financial decisions with confidence. Going through the *LifePlanning* process makes you a smart buyer of financial services because you know what questions to ask. This will make your financial plan better, no matter which financial professional you work with.

Keep in mind that planning is the process of bringing the future into the present so you can do something about it now. By developing a financial strategy within your *LifePlan*, you are ensuring that your assets will be used and distributed according to your wishes and needs well into the future.

After careful consideration and communication with any financial professionals you are working with, be sure to record your decisions in the Blueprint section of this series.