



## a vision | a plan | a path

Every endeavor worth pursuing starts with a vision – an idea of what could be. An exciting opportunity, a new business venture, an image of a better future and the life you want to live.

As important as your vision is, the odds of success are better if you have a Plan to achieve it – and a Path to help you get there. Our role at Jungen & Co. is to help foster a collaborative planning environment that creates the Focus that's needed while providing the Orchestration that is critical to success.

It all starts with you – your dreams and your goals. But we live in a complicated world with competing needs, wants and resources that need to be managed.

Our Holistic Planning Process will look at all your goals and resources concurrently – so that you can be confident that all these parts are working in harmony with one another.

By working to help you crystalize your objectives and prioritize your goals, we can create a better understanding of what's needed to increase the odds that your Vision will become your reality.

### Providing Orchestration Creating Focus



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**JUNGEN & CO.**  
FINANCIAL ADVISERS

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### What is your Vision?

Every Endeavor worth pursuing starts with a vision- an idea of what could be.

An exciting opportunity, a new business venture, an image of a better future and the life you want to live.

As important as your vision is, the odds of success are better if you have a plan to achieve it and a path to help get you there.

### Our Collaborative Planning:

- Supports you in getting clear on what you want in your life- *Your Vision*

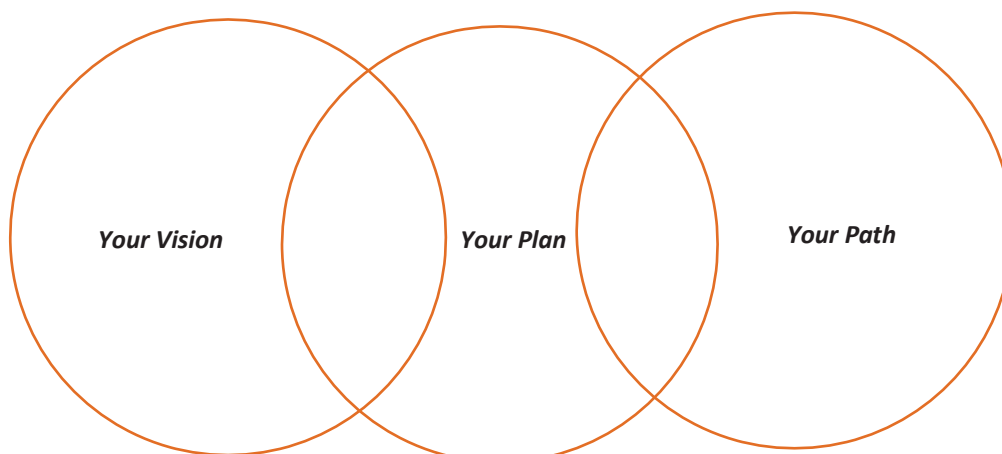
Retire at 55	Education fund for my children or grandchildren
Travel the world	Start a new business
Support a charity	Obtain an advanced degree

- Assist you to prioritize your goals - *Your Plan*

What is most important?	What would I be willing to accept less of?
What would I be willing to do more of?	What behaviors would I be willing to change?

- Help crystalize what is needed to make your vision your reality - *Your Path*

Budgeting	Tax Strategies
Maximizing Savings	Risk Management
Estate Planning	Investment Management





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## Your Vision

*What is your vision?*

Use the first box on the right to describe the vision you have for your life.

1	<b>Your Vision</b>	<b>EXAMPLE:</b>
		<i>Retire at 62 and travel the country in an RV.</i> <i>Provide for my family if something should happen to me.</i> <i>Start a new business.</i>

## Your Plan

*Making your Vision a reality.*

Use the second box to plan what you need to do to achieve your Vision.

2	<b>You &amp; Your Adviser Plan</b>	<b>EXAMPLE:</b>
		<i>Live more modestly now.</i> <i>Save more money than I currently am.</i> <i>Put off my goals for a few more years than I'd like.</i> <i>Leave less money to my heirs than I had anticipated.</i>

## Your Path

Now that you've thought about your vision and your plan, we can help you create the path leading to your Vision as your reality.

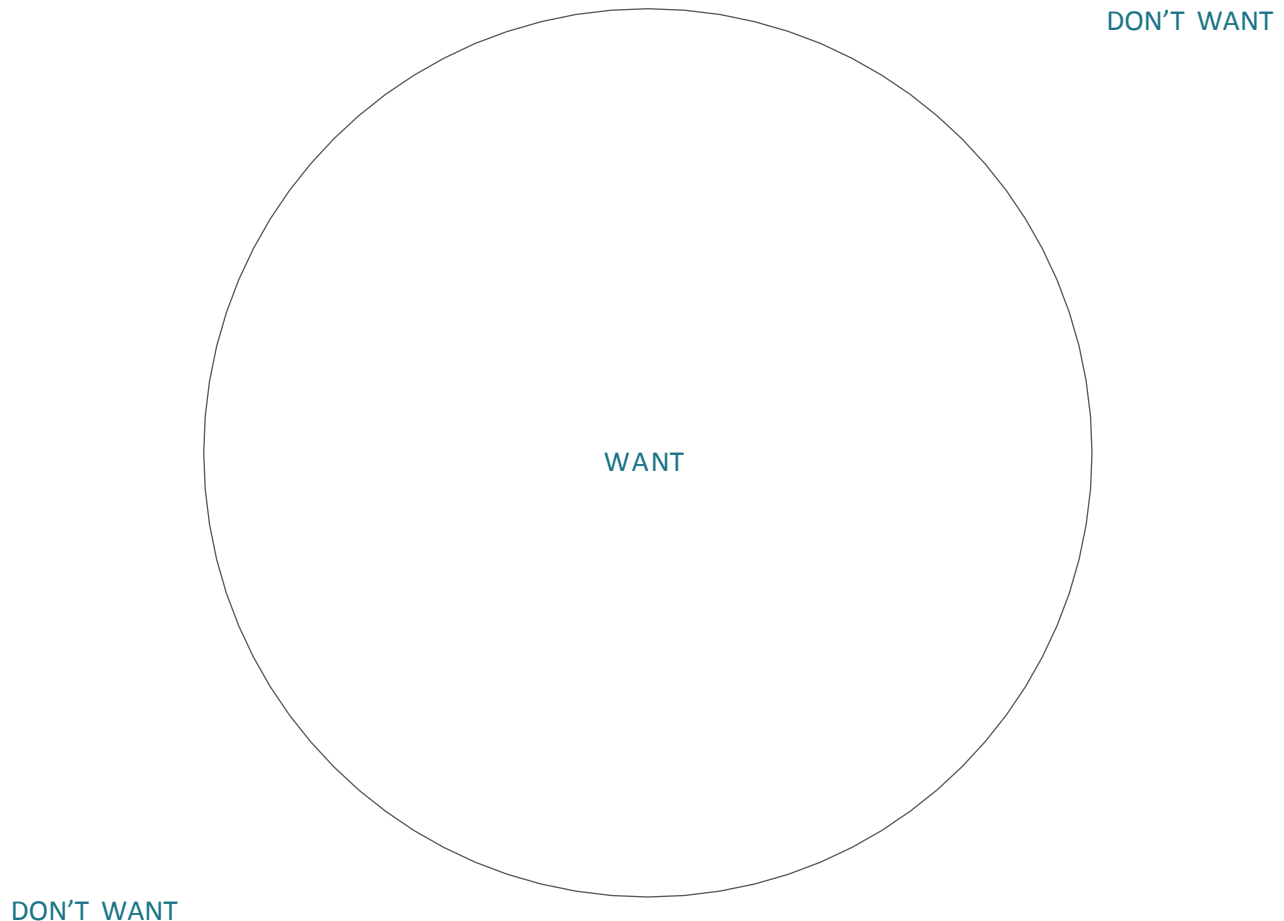
3	<b>Your Adviser Path</b>	<b>EXAMPLE:</b>
		<i>Create disciplined savings and investment strategy including funding Roth IRA's and to take advantage of employer 401k to maximize match.</i> <i>Review detailed cash flow analysis and retirement analysis.</i>



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The law of attraction causes us to attract the things that we are thinking about into our lives, it is important to know what we want! Use this simple exercise to make it clear. Place what you do want in life inside the circle. Place what you don't want outside of the circle. This will help you focus on what is important for you to have in your vision & plan.

Consider what you want in: health, career, contribution, family, retirement and your legacy.





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## Your Plan

Now that your *Vision* is clear you should evaluate how important each step of your plan is to making your vision your reality and examine the steps required to obtain your *Vision* along with the risks and what can go wrong.

In order to make my vision a reality, I would be willing to modify the following:

*Review each of the following items and think about what you'd consider changing to achieve your goal*

- I am willing to delay the ideal date of achieving my goal in order to reach my primary objective.
- I am willing to accept less now in order to achieve my goal as I originally planned.
- I am willing to lower my expectations of what my vision will look like so that I don't have to accept less now.
- I am willing to change my quality of life now so that I can realize my vision sooner.

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Expand on your *Plan* here - Take into account how you answered the questions above and take time to expand on what changes you could make now or in the future to really make your vision of the life you want a reality.

*Ex. So that I am able to retire at 62 rather than delay retirement to 65 I will take less vacations now and save more for retirement.*

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## SWOT Analysis Worksheet

What are the strengths, weaknesses, opportunities or threats in your plan?

<b>Strengths</b> What do you do well? What unique resources can you draw on? What personal attributes give you an advantage?	<b>Weaknesses</b> What could you improve? Where do you lack resources, personal or financial? What are your vulnerabilities?
<b>Opportunities</b> What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities?	<b>Threats</b> What threats could harm you? What could go wrong? What threats do your weaknesses expose you to?







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## Your Path

Knowing your Vision and creating a Plan to identify the steps involved in making that Vision a reality are very important first steps. Just as important is developing the Path to get you there. Making sure that you get the proper advice with custom-tailored strategies that fit you and match your goals is the next step in realizing your Vision. At Jungen & Co. Financial Advisers we focus on the opportunities but just as importantly, the risks and what can go wrong to help create a strategy that will potentially increase the odds of your success.

### *Next steps:*

- **Budget Preparation** - Assists you in identifying resources and liabilities.
- **Priority Checklist\*** - Consider what your most important financial priorities are.
- **Financial Attitude Questionnaire\*** - Analyze how you feel when it comes to financial situations.
- **Five Areas Checklist** - Identifies the five areas of financial planning that must be considered in any plan.
- **Cash Flow Analysis** - Analyze your current cash flow to find deficiencies and develop strategies to reach your goals.
- **Risk Aware Investment Process** - Create a strategic investment plan that encompasses all pertinent objectives.
- **Track, Review & Adjust**- By keeping track of your progress or reaching your goals you will keep both yourself and your adviser accountable for making your vision a reality.

*\*Visit the 'Working Together' tab on our website to find out more or to download some of the above documents.*