

FINANCIAL PLAN 2026

Jumet FINANCIAL

INSURANCE PLANNING			
Provider	Term	Amount	End Date

ESTATE PLANNING				
Will	Health Care POA	Durable POA	Gifting	Spendthrift Trust

EDUCATION PLANNING		
Pre-College Children	Age	Savings Goal

GOALS		
Goal	Status	Notes

www.jumetfinancial.com
621 7th Avenue, Beaver Falls, PA 15010

Securities and Retirement Plan Consulting Program advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC. Other advisory services offered through Western Wealth Management, dba Jumet Financial. Tax services offered through Jumet Financial Tax Services, LLC. Western Wealth Management, Jumet Financial and Jumet Financial Tax Services are separate entities from LPL Financial.



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PREPARED FOR:

PREPARED BY:

CURRENT OVERVIEW							
Type of Account	Account Owner(s)	Account Value	Monthly Contributions	Monthly Distributions	Beneficiaries	Asset Allocation	Annual Performace
Total		$	$	$			

DEBT MANAGEMENT			
Debt Name	Debt Amount	Interest Rate	Payoff Timeframe

RETIREMENT PLANNING					
Retirement Analysis	Pension	Social Security	Retirement Age	Outside Retirement Accounts	Annual Contributions