

John and Jane Sample Fiancial Vision Document



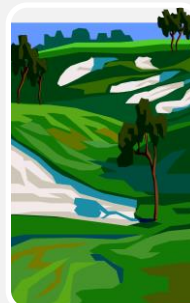
We would like to be financially independent by the time John turns 65. John will likely continue to work for some time but would like the freedom and independence to work as needed on a part-time basis.



We strongly value the education of our children. We desire the ability to fully fund post-secondary tuition. We would like to be able to offer school in the USA should they choose.



We would like to be able to take two Cruises a year upon retirement. We have already taken cruises through the Medetrainian + Caribbean but would like to continue trying out new cruises at different times of year. We would like to have the ability to invite our children from time to time.



We like to play golf and would like to continue with our club membership through retirement. We invision taking our children & grandchildren to the club to spend mornings golfing and going for brunch on the weekends.