

One Page Plan

Watch your cashflow
The full plan, in two minutes



Prepared for **Mr & Mrs Hartley** · June 2026

To retire at 60 with the freedom to **support our family** and **leave a legacy**.

FREEDOM NUMBER

£1.1m

The capital that makes work optional

NET WORTH

£1.23m

Assets less the mortgage

SAVINGS RATE

22%

Saved each year



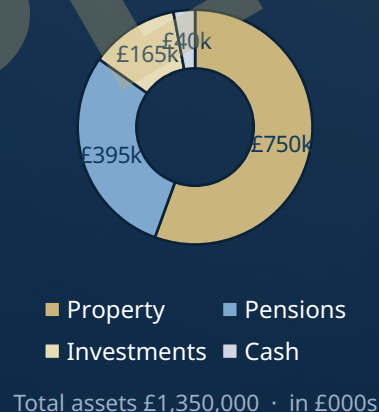
YOUR GOALS

What you're working toward



YOUR ASSETS

Where you stand today



YOUR ACTIONS

Now

- Raise pension contributions to 22%.
- Use both ISA allowances this year.
- Overpay the mortgage before age 60.

Next

- Consolidate older workplace pensions.
- Gift from surplus income each year.
- Refresh Wills and Powers of Attorney.

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