

NET WORTH & CASH FLOW



DONALDSON
CAPITAL MANAGEMENT

BUILDING THE FOUNDATION OF YOUR FINANCIAL PLAN

Understanding where you stand today is the first step toward where you want to go. That's why we begin your financial plan with a clear picture of your net worth—by organizing your assets and liabilities. From there, we take a close look at your income and expenses to understand your cash flow and how it supports your lifestyle and goals.

Together, these insights form the foundation of your personalized financial plan. They help us uncover opportunities, highlight potential challenges, and guide the strategies we'll build together.

Want to see what this looks like in action?

Ask your advisor for a sample report.



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