

FAIRWINDS

Money Milestone 5

Connect with an advisor



How to Achieve This Milestone

☐ Schedule a Meeting with an Advisor

Meeting with an advisor helps you plan your next steps with clarity and confidence. Schedule a no-pressure, complimentary session.

☐ Build a Plan That Works

A strong budget helps advisors maximize every dollar.



Build a Budget Guide

Create a plan you
can stick to



Budget Calculator

See your finances
at a glance



Goals & Budgets

Track spending and
stay on course

☐ Come Prepared with Questions

Make the most of your time. Bring your budget and questions to leave with a clear plan you'll feel confident about.



Explore tools and take the next step

fairwinds.org/milestone5