



Instructions Available @ www.watchguardcapital.com/resources



STEP 1. Complete these surveys if you need help making a list of possible occupations to consider.

Values: <https://www.careeronestop.org/Toolkit/Careers/work-values-matcher.aspx>

Interests: <https://www.careeronestop.org/Toolkit/Careers/interest-assessment.aspx>



STEP 2. Visit the U.S. Bureau of Labor Statistics Occupational Outlook Handbook website at

<https://www.bls.gov/ooh/a-z-index.htm>

Use a search option to find three occupations to consider. At a minimum, review summary duties, median salary, education requirements, and job outlook. Capture information here:

Attach Occupational Handbooks Here:



Occupations:

SOC Code:

Job Outlook:

Median Salary:

Education Required:

Education Level:

Occupation Notes:

| | | |
|--|--|--|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |



STEP 3: Visit the U.S. Bureau of Labor Statistics Occupation Employment and Wage Estimates website at https://www.bls.gov/oes/current/oes_nat.htm

Occupations:

Attach Wage Estimate Reports Here:



STEP 4: Select up to three states you are considering living in. Are these locations good or bad choices for the occupations you are considering?

| | | | |
|----------------------------|--|--|--|
| States | | | |
| | | | |
| | | | |
| Occupation Location Notes: | | | |



STEP 1. If the occupations you are considering do not require higher-level education, carefully consider the costs and benefits of delaying income and acquiring student loan debt.



STEP 2. Access the National Center for Education Statistics' College Navigator tool at <https://nces.ed.gov/collegenavigator/>

Use the search option to find information on three schools you are considering. At a minimum, review the average price, graduation and default rates, and conferred degrees.

Attach Reports Here:



| | | | |
|--------------------|---|---|---|
| Schools: | | | |
| Average Net Price: | | | |
| Graduation Rate: | | | |
| Transfer-out Rate: | | | |
| Default Rate: | | | |
| Conferred Degrees | Associate Bachelor Master Doctor | Associate Bachelor Master Doctor | Associate Bachelor Master Doctor |
| | | | |
| | | | |
| Notes: | | | |



STEP 3: How will degrees from these schools be perceived where you are considering living?

| | | |
|--|--|--|
| | | |
| | | |
| | | |



STEP 4: Rank your Schools and Occupations.

Create your plan and invest your time wisely!

PLAN:

School Rankings

Occupation Rankings

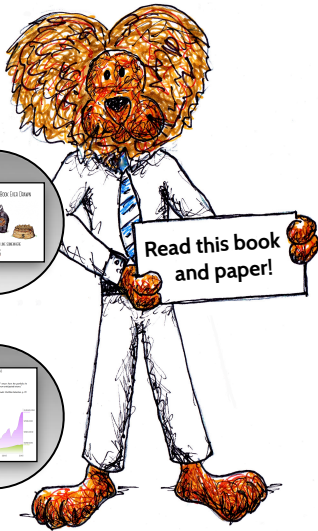
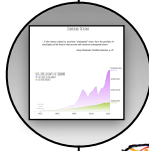
| | |
|---|--|
| 1 | |
| 2 | |
| 3 | |

| | |
|---|--|
| 1 | |
| 2 | |
| 3 | |



ADDITIONAL SPACE FOR NOTES & PLANNING

ADDITIONAL RESOURCES



Our educational system and financial industry do not adequately educate individuals about the importance of financial planning or prepare them to make smart financial and investment decisions.

Book: **THE MOST IMPORTANT FINANCE BOOK EVER DRAWN... BECAUSE WE HAVE TO DRAW THE LINE SOMEWHERE**

This book was created to help bridge that information gap. It is written so an individual can read it in about an hour and have a basic understanding of the most common and important financial concepts and principles.

Paper: **INVESTMENT THEORY PRIMER**

As retirement plans increasingly shift from pension systems to 401(k) and Individual Retirement Accounts, the population is due increased quality in both financial education and advice. This paper was written to provide you the knowledge necessary to invest your time and savings wisely.

Both are Available for FREE @ www.watchguardcapital.com/resources



This product is for educational purposes only and does not consider your unique situation. Occupation and educational planning are only as effective as the individual completing the analysis and are highly dependent on the accuracy of the information used. Planning itself cannot guarantee success, but it should help. Watch Guard Capital LLC is a state Registered Investment Adviser in Arizona and Ohio and may only transact business in states in which we are registered, or qualify for an exemption. Copies of our background information and disclosures are available at www.watchguardcapital.com