



## OFW-001: Financial Exit Planner

A structured workbook to help Overseas Filipino Workers transition from remittance-based income to asset ownership and financial sovereignty.

### 1. Remittance Audit (Last 6 Months)

Month	Total Remittance Sent	Estimated Allocation (Needs / Savings / Investment)

### 2. Allocation Plan (Target)

Recommended baseline:

- 50% Needs
- 30% Savings/Investment
- 20% Discretionary

### 3. Emergency Fund Tracker

Target Amount	Current Savings	Gap

### 4. Asset Conversion Plan

Asset Type	Estimated Cost	Expected Monthly Income	Timeline

### 5. Exit Timeline (5–10 Year Plan)

Year	Milestone	Notes
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		