

FINANCIAL GOALS WORKSHEET
Print, complete, and bring to your meeting.

Check your goals and then rank them by priority.	Important (Check)	Your Rankings (1-10) (10=Highest)
Finance Children's Education	<input type="checkbox"/>	_____
Buy a new home (primary or vacation)	<input type="checkbox"/>	_____
Buy a new car/boat/furniture/other personal property	<input type="checkbox"/>	_____
Travel extensively	<input type="checkbox"/>	_____
Reach the proper level of insurance protection for self and family	<input type="checkbox"/>	_____
Save for retirement	<input type="checkbox"/>	_____
Reduce/eliminate debt	<input type="checkbox"/>	_____
Set up a reserve/emergency fund	<input type="checkbox"/>	_____
Be financial independent at age: _____	<input type="checkbox"/>	_____
Substantially contribute to favorite charity/institution	<input type="checkbox"/>	_____
Invest in the stock market	<input type="checkbox"/>	_____
Help support elderly parent(s)	<input type="checkbox"/>	_____
Invest in real estate (land, rental property)	<input type="checkbox"/>	_____
Start/buy/expand own business	<input type="checkbox"/>	_____
Start a formal retirement plan for my business	<input type="checkbox"/>	_____
Leave large estate for children	<input type="checkbox"/>	_____
Other: _____	<input type="checkbox"/>	_____
Other: _____	<input type="checkbox"/>	_____
Other: _____	<input type="checkbox"/>	_____

Goal Listing

Below is a list of my/our financial goals, in order of importance

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____
- 8 _____