

# Goals Worksheet



Please Select All that Apply

## Section I: Confidence

How do I feel about my current financial situation?	Not Confident	Not Sure	Confident
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How confident am I in reaching my financial goals?	Not Confident	Not Sure	Confident
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## Section II: In the next 5 years I want to...

Expected Amount

Make a home improvement (repair or remodel)

Upsize current living situation (monthly increase in cost)

Downsize current living situation (monthly decrease in cost)

Purchase an additional property (first home, rental, vacation home, etc)

Buy or lease a new vehicle (car, boat, RV, etc)

Take a dream vacation

## Section III: Goal Categories

### Family

Have or adopt a new child

Fund a child's education /day care

Change of marital status

Save for large family event (wedding.)

### Professional

Pursue further education

Make a career change

Start my own business

Work after retirement

Myself    Spouse

### Estate Planning

Set up a will or trust

Provide for family in the event of death

Strong desire for charitable giving

Leave a large portion of estate to heirs

### Health Care

Prepare for future medical expense

Plan for potential disability

Consider long-term care impacts

Provide for other family members

Myself    Spouse

## Section III: Retirement

Name

Desired Retirement age