

Goals and Objectives

What's important to you?

To clearly understand your needs, take a moment to review this list to determine what's important to you

Importance
Low >>> High

Notes:

Financial Management and Cash Flow Planning

Paying off debts and / or mortgage	1	2	3	
Staying ahead of the cost of living	1	2	3	
Developing a financial reserve	1	2	3	

Investments Planning & Asset Allocation

Implement a disciplined savings and investment plan	1	2	3	
Principal should be safe	1	2	3	
Professional asset management	1	2	3	

Retirement Planning

Retiring early and comfortably	1	2	3	
Ensuring my funds last through retirement	1	2	3	
Affording travel & hobbies	1	2	3	

Risk Management / Insurance Planning

Family income protection in case of death, disability, or critical illness	1	2	3	
Surviving possible unemployment	1	2	3	
Ensure continuity of business operations in event of any health issues	1	2	3	
Financial Security for Long-Term Health-Care	1	2	3	

Estate Planning

Preserving my estate for my beneficiaries	1	2	3	
Leaving a Legacy	1	2	3	

Tax Planning

Reduce my taxable income	1	2	3	
Build tax-free income	1	2	3	

Your Unique Situation

Learning to invest wisely	1	2	3	
Plan for leisure activities (travel, boat, RV, etc.)	1	2	3	
Plan a major expenditure (home, cottage, vehicle, wedding, etc.)	1	2	3	
Owning my own business	1	2	3	
Paying for a child or grandchild's education	1	2	3	
Charitable giving	1	2	3	

Name _____