



Client:

Date:

Refine Your Financial Goals

Please take a moment to envision your financial future and help us understand what matters most to you. This will help you to develop a detailed plan to accomplish your goals.

| FINANCIAL INDEPENDENCE | | |
|------------------------|-------------------------|--------------|
| Name | Desired Annual Spending | Desired Year |
| | | |
| | | |

What I would like to do (volunteering, second career, relaxing, hobbies, who to spend time with, etc.):

| FUNDING MAJOR PURCHASES | | |
|--|---------------|----------------|
| Item (Ex: real estate, car, wedding, travel) | Amount Needed | Year(s) Needed |
| | | |
| | | |
| | | |

| PAYING OFF DEBT | | |
|-----------------|--------|-------------|
| Type of Debt | Amount | Payoff Date |
| | | |
| | | |

| WEALTH TRANSFER GOALS | |
|--|---|
| Recipients (Individuals or organizations) | How I Want It Shared (Ex: while living, at death, specific \$ amount or %) |
| | |
| | |

| HELPING WITH COLLEGE EXPENSES | | |
|-------------------------------|------------------------|----------------|
| Student | Amount I Want to Cover | Year(s) Needed |
| | | |
| | | |

OTHER FINANCIAL GOALS
