

What Are Your Priority Goals?

Prioritize the goals by putting a number one (1) beside your highest priority, two (2) beside your next highest priority, etc.

	Priority Rank	Time Frame
Financial security at retirement	_____	_____
College education funding	_____	_____
Real estate, vacation, home, travel, etc.	_____	_____
Adequate life insurance	_____	_____
Minimize estate taxes	_____	_____
Maximize return on investments given risk profile	_____	_____
Protect financial resources if disabled	_____	_____
Other: _____	_____	_____
Other: _____	_____	_____

How Are You Going To Achieve Your Goals?

Current Assets _____

Additional savings and investments _____

Earnings and compound earnings _____

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