



## Clarify Your Life Goals

Client Name \_\_\_\_\_

Date \_\_\_\_\_

### Directions:

1. Refer to the "Thinking about Life Goals" worksheet and identify the goals you are most excited about and feel inspired to pursue. List those life goals in the appropriate section below.
2. Next, write a few words (such as "increase security," "strengthen family ties," "have fun," "stretch my comfort zones") to describe your reason for each goal. This reason should be a reflection of one of your core values.
3. Now estimate the financial investment required to achieve each goal. A "guesstimate" is fine; these figures can always be refined as you gather more information. Be sure to consider the investment of time, energy, and other resources and whether these elements would lead to additional financial implications.
4. After you have completed your lists, assign a priority status of A, B, or C to each goal.

### Immediate Goals and Priorities

| Life Goal | Reason | Investment | Priority |
|-----------|--------|------------|----------|
|           |        |            |          |
|           |        |            |          |
|           |        |            |          |

### Short-Term to Mid-Term Goals and Priorities (1 to 5 Years)

| Life Goal | Reason | Investment | Priority |
|-----------|--------|------------|----------|
|           |        |            |          |
|           |        |            |          |
|           |        |            |          |

### Long-Term Goals and Priorities (5 Years or Longer)

| Life Goal | Reason | Investment | Priority |
|-----------|--------|------------|----------|
|           |        |            |          |
|           |        |            |          |
|           |        |            |          |