

Clarify Your Life Goals

Client Name _____

Date _____

Directions:

1. Refer to the "Goals for Life" worksheet and other Financial Life Planning exercises that have helped you to identify your most important life goals. List your life goals in the appropriate category 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.
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. In addition, consider the investment of time, energy, and other resources that will be needed.
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