

FINANCIAL GOAL SHEET

This year, my financial goal is...

Something I want to change about my money situation/finances...

Something I am saving for in the near or distant future is...

I'd like to work with my financial advisor this year on...

- creating a budget
- credit cards-debt, card choices, interest rates
- buying a home/saving for a home
- retirement and rainy day savings
- purchasing a big-ticket item
- home renovation
- starting my own business
- creating a will & power of attorney
- insurance needs (life, disability, auto, home, mortgage, etc.)
- other: _____