

Personal and Financial Goals

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Financial Goals

Please list your financial goals, ranked in order of importance. Please include as many as possible, keeping in mind each goal should be Specific, Measurable, Agreeable, Realistic, and Timed (specific date to attain, or number of years to attain).

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Personal Goals

Please list your personal goals, ranked in order of importance. Please include as many as possible, keeping in mind your goals should be Specific, Measurable, Agreeable, Realistic, and Timed (specific date to attain, or number of years to attain).

Note: A financial goal may also be a personal goal, but any personal goal should not be listed as a financial goal.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Priorities / Values

Please list your top five priorities in life (what deserves prior attention), ranked in order of importance.

1. _____
2. _____
3. _____
4. _____
5. _____