

CURRENT GOALS AND CONCERNS

Name: _____

Date: _____

Please check each goal or concern that is important to you at this point in time. Feel free to add additional goals and concerns.

- Having Adequate Cash Reserves & Emergency Funds
- Budgeting and/or Managing Debt
- Avoiding/Preparing for Unemployment or a Time Period with Reduced Income
- Providing for Children's Education
- Review of Investment Portfolio
- Review of Asset Allocation
- Avoiding Excessive Investment Risk
- Offsetting Inflation
- Invest a Lump Sum of Money
- Avoiding Excessive Income Taxes
- Having Adequate Retirement Income
- Having the Ability to Retire Early
- Managing Distribution of a Pension
- Protecting Assets from Medicaid

- Purchasing a Home
- Purchasing a Vacation Home or Second Home
- Purchasing a New Car
- Starting a Business
- Growing a Business
- Providing for the Family in Case of Death
- Providing for the Family in Case of Disability
- Having Adequate Medical Coverage
- Having Adequate Property & Liability Coverage
- Avoiding Excessive Estate Settlement Taxes
- Transferring Ownership of Assets

Other: _____

Other: _____

Other: _____

Other: _____

Other: _____

Other: _____