

# My Life and Financial Goals

How would you define or describe your life purpose?

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1. What are some goals that can help you achieve this life purpose?

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2. What are some financial goals that can help support your life goals and purpose?

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3. Short-term financial goals (next 12 months):

A. \_\_\_\_\_

B. \_\_\_\_\_

4. Mid-range financial goals (2–5 years):

A. \_\_\_\_\_

B. \_\_\_\_\_

5. Long-term financial goals (5 years to retirement):

A. \_\_\_\_\_

B. \_\_\_\_\_