

# Financial *Life* Planning



## Life Goals Profile

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

*Life Goals are what we want to have happen to or in our lives sometime in the future. Once we identify the life goals that are meaningful to us we must then explore those goals in greater detail and plan for them accordingly.*

**Personal / Self**

**Priority Level**

- |  |                            |                            |                            |
|--|----------------------------|----------------------------|----------------------------|
| Go back to school to earn a degree or certification              | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Hire a coach (Personal, Career)                                  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Begin an exercise program (weight training, yoga, pilates, etc.) | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Hire a personal trainer  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Start a weight management program                                | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Address an important health issue                                | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Attend a personal development event (workshop, retreat, other)   | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Begin a new hobby  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Develop or master a skill  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Take art/music/dance classes                                     | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Learn a new language   | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |

**Family: (Parents, Children, Grandchildren, etc.)**

- |   |                            |                            |                            |
|---|----------------------------|----------------------------|----------------------------|
| Get married                                 | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Send a family member on a trip              | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Miscellaneous purchase for a family member  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Assist a family member with a home purchase | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Fund education expenses for a family member | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Purchase an automobile for a family member  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Provide long-term care for a family member  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Assist a family member with income needs    | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Create a parental pension                   | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Fund a child's wedding                      | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Fund funeral expenses for family member     | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Create a family business                    | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Transfer business to a family member        | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Have a baby                                 | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Adopt a child                               | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____                                 | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____                                 | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |

## Work / Career

- |  |                            |                            |                            |
|--|----------------------------|----------------------------|----------------------------|
| Change my career path  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Learn new skills by receiving advanced training or education | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Start my own business  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Develop a phased-retirement plan                             | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Retire from my current job or career                         | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Begin an experimental career                                 | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Take a sabbatical or leave of absence                        | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Form a business partnership                                  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Acquire or purchase a business                               | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Merge my business  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Expand an existing business                                  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____  | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |

## Leisure / Recreation

- |                                 |                            |                            |                            |
|---------------------------------|----------------------------|----------------------------|----------------------------|
| Go on a trip                    | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Purchase a family vacation home | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go on a family vacation(s)      | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Purchase a recreation vehicle   | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Purchase a motor home           | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go away on a hobby-related trip | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go on an adventure tour         | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Live in another country         | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____                     | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |

## Charitable / Legacy

- |  |                            |                            |                            |
|--|----------------------------|----------------------------|----------------------------|
| Get involved in a charitable organization        | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Create or fund a scholarship fund                | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Make ongoing contributions to specific charities | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go on overseas mission trip                      | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Create a foundation                              | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Give to a special project                        | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go on a charity related trip                     | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Include charities in my estate plan              | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____                                      | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |