

**Financial Goals 2013**

Current Savings, January 2013:

Money to save by December 31<sup>st</sup>, 2013:

Monthly savings amount to reach annual goal:

Where will this money come from? Will you save it automatically through your paycheck? Will you sell something?

Where will it be saved? A savings account? A CD, money market or annuity?

**Investment/Business Goals 2013**

I currently own/manage (property, business):

Home Buying/Selling/Improvement Goals:

\$ Needed to purchase/make improvements:

Retirement Plan Goals – Do you know how much money you'll need to retire? How much? How much should you investing annually?

Stocks/Bonds/Investment Goals:

**Employment and Education Goals 2013**

A new job? A raise? A promotion?

What will you do to make that happen?

Will you take classes in 2013? Where?

Obtain a degree? Certification? Which one(s)?

Do you plan to start a business? What kind? How?

**Physical Condition Goals 2013**

Current weight/body mass index:

Medical/Vision/Dental: Insurance? Check-ups?

**Spiritual Goals 2013**

For ex: I will attend church more consistently.

**Personal Goals 2013**

For ex: I will read more books this year. I will compliment one person every day.

**Personal Relationships Goals 2013**

For ex: I will foster a better relationship with my mother.

**Contribution Goals 2013**

For ex: I will donate to charity.

**Recreational Goals 2013**

For ex: I will go on a cruise for my birthday.

**Wildcard Goal 2013**

**My Trusted Partners**

Plumber

Handyman/Roofer/Flooring

Electrician

Painter/All-Purpose

Mechanic

Barber/Stylist

Dentist

**My Trusted Partners**

Insurance Agent

CPA/Accountant

Daycare Provider

Real Estate Agent

Attorney

Doctor