

Goals Exercise

Directions: Rank each of the following values 1-13 (or more). Clarify the definitions if you need to. No ties!

_____ FINANCE CHILDREN'S EDUCATION

_____ BUY A NEW HOME (PRIMARY/VACATION)

_____ BUY A NEW CAR/BOAT/THING

_____ TRAVEL EXTENSIVELY

_____ SAVE FOR RETIREMENT

_____ REDUCE/ELIMINATE DEBT

_____ SET UP A RESERVE/EMERGENCY FUND

_____ CREATE FINANCIAL INDEPENDENCE

_____ SUPPORT ELDERLY/ANY RELATIVES

_____ CONTRIBUTE TO FAVORITE CHARITY/CAUSE

_____ START/BUY/EXPAND OWN BUSINESS

_____ CREATE/LEAVE LARGE ESTATE FOR HEIRS

_____ PROVIDE FOR DEPENDENT'S SPECIAL NEEDS

_____ OTHER _____

_____ OTHER _____