

Client _____

Date Completed _____

WHAT DO YOU WANT?

Time is precious. Is the picture you are painting -your life- reflective of what you want? What is it you *really* want?

The goal setting process is perhaps the most critical of all in the development of a financial plan. All the projections that we can come up with mean nothing unless they represent those things that are dear to you. Some people have their desires clearly mapped out while others only have a vague idea of what it is that would make them happy.

While no one question can trigger your mind to determine what you really want, I have come up with a few questions that may help get you started. Feel free to write down your thoughts and ideas, or just ponder these questions until we meet again.

What in your current life “picture” do you like? (Your job, where you live, your relationships with family/friends...)

Did you expect your life to be different than it is? What would you change, if you could?

What is your “gut feeling” around money and financial matters? List any conflicts, stresses, or worries around money which you would like to eliminate.

What changes, if any, would you like to experience in the way you deal with money in your relationships?

What financial concerns are there in your life right now that you would like to address in your planning? If possible prioritize these items (i.e., #1 getting out of debt, #2 saving for retirement, #3 a good investment plan).

Financial Concern

Priority #

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What are your expectations of retirement?

When do you want to retire? Do you want to work at all in retirement?

What is it you are really passionate about? Are there changes you would like to make in your life that would allow you to give more of yourself to this passion? Has anything prevented you from fulfilling this passion?

Sit down and add up the hours in a week. In a typical week how many hours do you spend

Sleeping _____ Exercising _____ Eating/Interacting _____ Working _____ Playing _____ Watching TV _____

Reading _____ Driving _____ Doing Household Chores _____ Time with the Kids _____ Time with Friends _____

Time to do Nothing _____ Your Passion _____

Other:

Re: Time Summary

As you review your current time/energy investment, what would you change, if anything, to obtain what you really want? (i.e., “I’d work 10 hours less/week to develop my passion for writing.....”)

Imagine you are entering an art gallery featuring your current life picture on display. As you gaze at your current life picture, what do you notice?

Fill in the following by comparing your actual life picture to what you want and complete the sentence for each category: “When I compare my actual life picture with regard to _____ (area of my life) what I notice is.....and I’d like to.....”

Example:

Area of My Life	What I Notice.....	I’d Like to.....
Work	I come home exhausted at the end of each day with no energy for exercise or my family. I love the work I do.	I’d like to leave work each day by 5:00 pm and leave work early 2 days a week so that I have time for family and/or exercise. Ask my manager for more training.
Things to Have	Our house is too large for just the 2 of us to spend time maintaining it and cleaning it. I want to put more money into upgrading my equipment for my recreational	Free up my time as far as the house care is concerned. Consider a smaller house that still has room for company. Buy quality equipment for backpacking, biking, and skiing.

pursuits.

Area of My Life	What I Notice.....	I'd Like to.....
Work		
Soul/Spirit Work		
Creativity/Passion		
Play		
Relationships (Family/Friends)		
Philanthropy/Giving		
Things to Do (Travel, vacation, etc)		
Things to Have		
Other Money Goals		

Please circle the “area of your life” in the previous exercise that you would like to focus on first.