

Establishing Your Financial Goals

Short Term goals – Expected to be accomplished within one to two years. Examples – pay off credit card debt, college savings for children over 15, and a vacation.

Goals			
GOAL ONE	GOAL TWO	GOAL THREE	GOAL FOUR
Asset Dedicated to Goal			

Medium Term goals – Expected to be accomplished within two to five years. Examples – college savings for children 9 to 14, and new home.

Your Financial Goals			
GOAL ONE	GOAL TWO	GOAL THREE	GOAL FOUR
Asset Dedicated to Goal			

Long Term goals – Expected to be accomplished in greater than years. Examples – retirement savings, college savings for children under 8, and vacation home.

Your Financial Goals			
GOAL ONE	GOAL TWO	GOAL THREE	GOAL FOUR
Asset Dedicated to Goal			