

RETIREMENT GOALS	YES	NO
Do you need help deciding when you want to retire?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to retire early or late?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to slow down and work part time (semi-retire)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to take sabbaticals during your career?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to feel confident about your plans for retirement?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to feel confident about your retirement income sources (e.g., investment accounts, retirement plans, pension plans, Social Security)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to feel confident about your current (and future) financial situation?	<input type="checkbox"/>	<input type="checkbox"/>
Do you plan to change your residency in retirement?	<input type="checkbox"/>	<input type="checkbox"/>

FAMILY GOALS	YES	NO
Do you want to have or adopt a child?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to save for a child or relative's education?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to save for any family milestones (e.g., bar/bat mitzvahs, graduations, weddings)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to support family members who may require special needs planning?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any parents or other family members you want to care for?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have plans to change your marital status?	<input type="checkbox"/>	<input type="checkbox"/>

SELF-DEVELOPMENT & PROFESSIONAL GOALS	YES	NO
Do you want to achieve financial independence or improve your overall financial health?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to pursue more education or certifications for personal or professional reasons?	<input type="checkbox"/>	<input type="checkbox"/>
Are you looking for professional advancement (new job, career, promotion)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to optimize your employee benefits and compensation package?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to start your own business?	<input type="checkbox"/>	<input type="checkbox"/>

ASSET & DEBT GOALS	YES	NO
Do you want to reduce the risk of market volatility on your investments?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to increase the rate of return on your investments?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to improve your cash flow (increase income or reduce expenses)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to increase the amount you keep in your emergency fund?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to save more for future goals?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to protect your real and personal property from risk?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to refinance or pay off any loans (such as mortgages or student loans)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to refinance, consolidate, or pay off any debts (such as high-interest credit cards)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have plans for a second home or vacation property?	<input type="checkbox"/>	<input type="checkbox"/>

LIFESTYLE GOALS	YES	NO
Are you planning to move (such as changing your residence) now or in the future?	<input type="checkbox"/>	<input type="checkbox"/>
Are you planning to purchase or sell a home?	<input type="checkbox"/>	<input type="checkbox"/>
Are you planning to purchase or sell a second home?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to make a significant home improvement or major purchase?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to buy or lease a vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to plan a large vacation now or in the future?	<input type="checkbox"/>	<input type="checkbox"/>

TAX PLANNING GOALS	YES	NO
Do you want to reduce your tax liability now?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to reduce your tax liability in the future?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to support a charity?	<input type="checkbox"/>	<input type="checkbox"/>
Are you planning to sell a business, real estate, or another major asset?	<input type="checkbox"/>	<input type="checkbox"/>

HEALTH CARE GOALS	YES	NO
Do you need to plan for a disability?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to prepare for long-term care expenses?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to prepare for future medical expenses?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need to make changes to your health insurance coverage?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to age in your home and avoid a nursing home?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to prepare for a possible illness (for either you or spouse)?	<input type="checkbox"/>	<input type="checkbox"/>

ESTATE PLANNING & WEALTH TRANSFER GOALS	YES	NO
Do you want to provide gifts to your children and loved ones during your lifetime?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to protect your assets from creditors, bankruptcy, or divorce?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to feel secure that your appointed fiduciaries will carry out your wishes in the event of your incapacity and/or death?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to ensure that your spouse or other family members are cared for in the event of your death?	<input type="checkbox"/>	<input type="checkbox"/>
Are there charitable organizations that you want to support?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to ensure your assets pass to your heirs easily?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to place some restrictions on the assets your heirs will inherit?	<input type="checkbox"/>	<input type="checkbox"/>

MISCELLANEOUS GOALS	YES	NO
Are there any other goals you want to consider that are not addressed above?	<input type="checkbox"/>	<input type="checkbox"/>

The ULTIMATE DIY Guide



Perspective. Guidance. Protection.

Financial planning is more than investment advice.

Please allow this resource to guide your questions - Give us a call if you need anything.

You asked for it and here it is. The ultimate DIY Guide to financial planning. Goal setting is important - be thoughtful when evaluating some of these common financial planning topics.

Remember - each situation is different, please reach out for a more detailed explanation or advice.

Tyler Smith, Founder & Financial Advisor

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