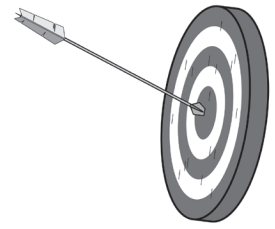


Goals & Objectives



Couples that set goals together, grow together.

Date: _____

Exercise: Take the liberty to dream, and don't let reality hinder your thoughts. One of the basic rules of goal setting is to allow your subconscious mind the freedom to dream, and it will help bring things to you.

Things we would like to spend money on:

Vacations we would like to take:

Projects we want to accomplish:

Improvements we want to make:

Personal Information

The best way to predict the future is to create it.

Exercise: The past is a bucket of ashes. You can't burn it again but you can learn from it. Forward thinking and looking ahead allows you to become the person you could admire and desire to be.

Name:

Height:

Weight:

Age:

Occupation:

Current interests and things I enjoy:

My good qualities:

Areas for improvement:

Things I wish I were doing:

Things I would like to learn:

Your Personal Time Lines

Keeping it in perspective!

Exercise: If you're a married couple, then each of you take a line (use the top grid as an example). Create a time line showing the years that things happened in the past, or future years of expectation. When were you born? What year were you married? Do you have kids? When will they need education dollars? What age will you retire? Does longevity run in your family? How old do you think you'll be when you die?

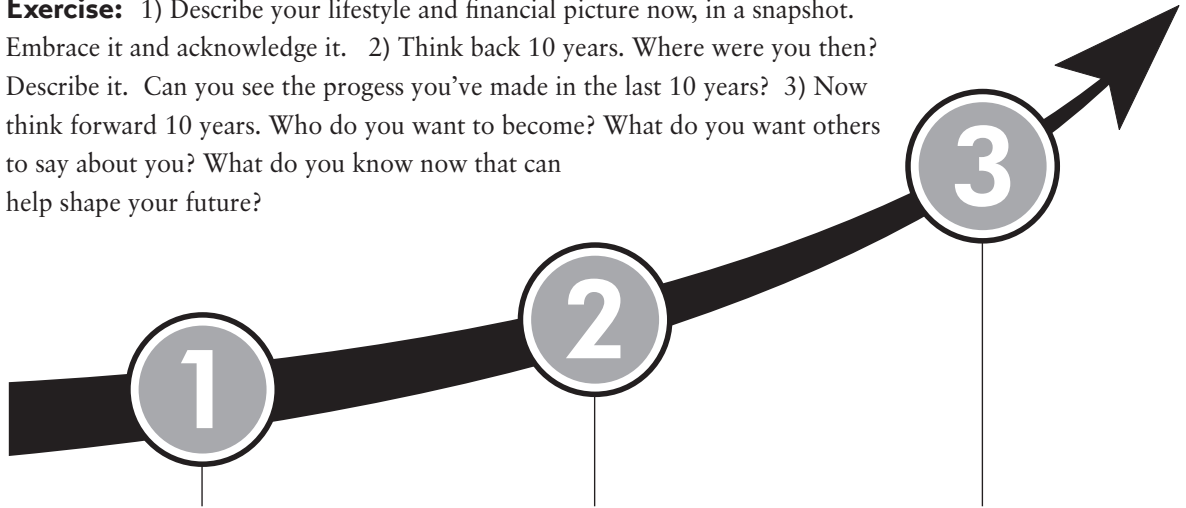
“Life is not a foot race, it is a relay race. Someone passed you the baton as you came into the race — and you’ll pass it again on your way out.”

			1995	2013		
Mike	1952	1989	1993	2011	2017	2037
	Born	Married	Kids	Education	Retirement	Death
Sarah	1960	1989	_____	_____	2010	2060
			_____	_____		
			_____	_____		
			_____	_____		
	Born	Married	Kids	Education	Retirement	Death
			_____	_____		
			_____	_____		

“The measure of a man’s character is not what he gets from his ancestors, but what he leaves his descendants.”

A Snapshot of Your Life

Exercise: 1) Describe your lifestyle and financial picture now, in a snapshot. Embrace it and acknowledge it. 2) Think back 10 years. Where were you then? Describe it. Can you see the progress you've made in the last 10 years? 3) Now think forward 10 years. Who do you want to become? What do you want others to say about you? What do you know now that can help shape your future?



Where were you 10 years ago?

Year:

Net Worth:

\$ _____

Investment Net Worth:

\$ _____

Savings Rate (%):

Tax Rate (%):

Insurance Protection:

\$ _____

Home:

Cars:

Annual Income:

\$ _____

Kids Ages:

Where are you now?

Year:

Net Worth:

\$ _____

Investment Net Worth:

\$ _____

Savings Rate (%):

Tax Rate (%):

Insurance Protection:

\$ _____

Home:

Cars:

Annual Income:

\$ _____

Kids Ages:

Where will you be 10 years from now?

Year:

Net Worth:

\$ _____

Investment Net Worth:

\$ _____

Savings Rate (%):

Tax Rate (%):

Insurance Protection:

\$ _____

Home:

Cars:

Annual Income:

\$ _____

Kids Ages:
