

One of the first steps toward determining your financial goals is to begin with the “end in mind.” A vision is where you see yourself in the future—it should capture what you want to be and do. Creating the mental vision first can lead to physical action. Please take some time and describe your vision. It can be for any time frame you want and it need not be perfect, it will evolve over time.

My/Our Vision

Goals and Objectives

Describe the primary financial concerns you have:

1. _____
2. _____
3. _____
4. _____
5. _____

Describe the primary obstacle(s) that you believe could impede achieving your goals:

1. _____
2. _____
3. _____
4. _____
5. _____

Personal Financial Objectives

If we were sitting together, 3 years from now, looking back over those 3 years, what has to have happened during that period for you to feel happy with your progress? Write in present tense.

Comments:

