



YOUR GOALS AND DREAMS

SHORT TERM GOALS: (3 months to 3 years)

MEDIUM TERM GOALS: (5 to 7 years)

LONG TERM GOALS: (10 years and longer)

CURRENT FINANCIAL PLANNING CONCERNS:

- If you are not currently retired, at what year or age do you plan to retire? _____
 - How much money do you require (in today's dollars) each year in retirement? _____
- OR
- What percent of your current income will you require in retirement? (usually 60%-80%) _____

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