

## IDENTIFYING ACCOUNT GOALS

TAXABLE ACCOUNTS (Checking, Savings, Money Market, Brokerage, etc.)		
Type of Account	Goals	Notes

TAX ADVANTAGED ACCOUNTS (401(k) IRAs, 403b, HSAs, 529, etc.)		
Type of Account	Goals	Notes

CASH VALUE INSURANCE CONTRACTS (Whole Life, Universal Life, VUL, IUL, etc.)		
Type of Account	Goals	Notes