

Name:

Date:

Brain Dump: Short and Long Term Goals

Let us help you articulate your situation. Put a check beside any that apply to you:

<input type="checkbox"/> I am working towards my financial goals.	<input type="checkbox"/> I am stressed about finances.	<input type="checkbox"/> I do not know how my business will help me in retirement.
<input type="checkbox"/> I contribute to an HSA.	<input type="checkbox"/> I have no strategy to overcome obstacles.	<input type="checkbox"/> I have a clear path to retirement.
<input type="checkbox"/> I have undefined goals.	<input type="checkbox"/> I do not take advantage of my 401(k) match.	<input type="checkbox"/> I need to fund some short-term goals.
<input type="checkbox"/> I can see my investments growing.	<input type="checkbox"/> I am not sure why I save money.	<input type="checkbox"/> I have unfinished estate plans.
<input type="checkbox"/> I need to prepare to take care of aging parents.	<input type="checkbox"/> I am not sure how to save for retirement in a tax efficient manner.	<input type="checkbox"/> I am not sure if I should borrow or pay cash for big purchases.
<input type="checkbox"/> I have a hobby I want to become a business in retirement.	<input type="checkbox"/> My insurance coverage is adequate.	<input type="checkbox"/> I have inadequate emergency savings.
<input type="checkbox"/> My money is allocated in the wrong investments.	<input type="checkbox"/> I am afraid to spend money.	<input type="checkbox"/> I have no idea if my employer plan is set up correctly.
<input type="checkbox"/> I want to take a big vacation.	<input type="checkbox"/> I don't have a plan.	<input type="checkbox"/> I need to prepare for college expenses for my children.
<input type="checkbox"/> I do not identify obstacles to my goals.	<input type="checkbox"/> I have too much cash on hand.	<input type="checkbox"/> I would like to invest more.
<input type="checkbox"/> I spend more than I make.	<input type="checkbox"/> I have health problems.	<input type="checkbox"/> I have too many accounts/advisors.

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