


Name: _____ Date: _____

YOUR GOALS/DREAMS

If we were meeting three years from today, and you were looking back to today, what has to have happened over those three years personally, financially and professionally for you to feel happy about your progress?

 **PRIORITIZE** the 3 most important areas from the following (i.e. #1 family, #2 financial #3 travel).

___ **PERSONAL**

___ **FAMILY**

___ **FINANCIAL - Please detail (i.e. 0-1 Year: Buy \$6,000 RSP, repay \$4,000 Visa, etc)**

0-1 Year _____

1-3 Years _____

3-20 Years _____

Retirement date: mm/dd/yy _____ Estimate spendable

Income/yr. In today's \$ _____

___ **PROFESSIONAL/CAREER**

___ **TRAVEL/ADVENTURE**

___ **OTHER**

“We have met the enemy...and he is us! Pogo “When your values are clear
your dreams are easy” Roy Disney

“A dream is just a dream. A goal is a dream with a plan and deadline.”
Harvey McKay – author of “Swim with the Sharks...”

