

Please indicate which of the following goals are important to you by marking:

A = Essential B = Strong Desire C = Moderate Desire D = No Desire

Asset Management	Priority	By what date
Reduce debt		
Establish cash reserve		
Establish family budget		
Establish retirement accumulation plan		
Establish investment accumulation plan		
Maximize investment income		
Diversify investment portfolio		
Invest in own business		
Lifestyle		
Purchase a home		
Add on to existing home		
Purchase a new car		
Make a major purchase		
Travel to:		
Increase spendable income		
Decrease expenses		
Income Tax		
Reduce current income tax		
Reduce/minimize future income tax		
Risk Management		
Protect family lifestyle in case of death		
Protect family lifestyle in case of disability		
Estate Planning		
Minimize estate taxes		
Provide adequate estate liquidity		
Provide for survivors		
Accumulate an estate to pass on to heirs and/or charities		
Other		
List your three most important goals in order of priority:		