



IFG Goals Exercise

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Goals Exercise

What's on your Needs, Wants, and Wish List? What do you still want to do?

Directions: Rank each of the following values 1-13 (or more). Remember, you must rank each one; no ties!

- ___ FINANCE CHILDREN'S/GRAND CHILDREN'S EDUCATION
- ___ BUY A NEW HOME (PRIMARY/VACATION)
- ___ BUY A NEW CAR/BOAT/THING
- ___ TRAVEL EXTENSIVELY
- ___ SAVE FOR RETIREMENT
- ___ REDUCE/ELIMINATE DEBT
- ___ SET UP A RESERVE/EMERGENCY FUND
- ___ CREATE FINANCIAL INDEPENDENCE
- ___ SUPPORT ELDERLY/ANY RELATIVES
- ___ CONTRIBUTE TO FAVORITE CHARITY/CAUSE
- ___ START/BUY/EXPAND OWN BUSINESS
- ___ CREATE/LEAVE LARGE ESTATE FOR HEIRS
- ___ PROVIDE FOR DEPENDENT'S SPECIAL NEEDS
- ___ OTHER _____
- ___ OTHER _____

