

Your wealth. Your goals.

What does wealth mean to you?

“Wealth” means different things to different people. For some, it means security or independence; for others, wealth brings to mind images of travel. What does wealth mean to you?

Building this vision requires self-reflection and honesty. This worksheet aims to help you define your unique goals, a critical step in the financial planning process.

My wealth is...

What are your S-M-A-R-T goals?

Once you define what wealth means to you, you can set S-M-A-R-T (**S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime-bound) goals to help you achieve it. Write your goals down and review them regularly to inspire you to act.

Short-term goals (under 3 years)

Needs

Wants

Goal #1:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Goal #1:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Goal #2:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Goal #2:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Medium-term goals (3-10 years)

Needs

Goal #1:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Goal #2:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Wants

Goal #1:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Goal #2:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Long-term goals (10+ years)

Needs

Goal #1:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Goal #2:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Wants

Goal #1:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

Goal #2:

Amount needed: \$

Amount saved today: \$

Date to achieve:

Steps to get there:

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