2021 · MASTER LIST OF GOALS

MBE WEALTH
Personalized Planning. Fiduciary Focus.

RETIREMENT GOALS	YES	NO
Do you need help deciding when you want to retire?	☐	☐
Do you want to retire early or late?	☐	☐
Do you want to slow down and work part time (semi-retire)?	☐	☐
Do you want to take sabbaticals during your career?	☐	☐
Do you want to feel confident about your plans for retirement?	☐	☐
Do you want to feel confident about your retirement income sources (e.g., investment accounts, retirement plans, pension plans, Social Security)?	☐	☐
Do you want to feel confident about your current (and future) financial situation?	☐	☐
Do you plan to change your residency in retirement?	☐	☐

FAMILY GOALS	YES	NO
Do you want to have or adopt a child?	☐	☐
Do you want to save for a child or relative's education?	☐	☐
Do you want to save for any family milestones (e.g., bar/bat mitzvahs, graduations, weddings)?	☐	☐
Do you want to support family members who may require special needs planning?	☐	☐
Do you have any parents or other family members you want to care for?	☐	☐
Do you have plans to change your marital status?	☐	☐

SELF-DEVELOPMENT & PROFESSIONAL GOALS	YES	NO
Do you want to achieve financial independence or improve your overall financial health?	☐	☐
Do you want to pursue more education or certifications for personal or professional reasons?	☐	☐
Are you looking for professional advancement (new job, career, promotion)?	☐	☐
Do you want to optimize your employee benefits and compensation package?	☐	☐
Do you want to start your own business?	☐	☐

ASSET & DEBT GOALS	YES	NO
Do you want to reduce the risk of market volatility on your investments?	☐	☐
Do you want to increase the rate of return on your investments?	☐	☐
Do you want to improve your cash flow (increase income or reduce expenses)?	☐	☐
Do you want to increase the amount you keep in your emergency fund?	☐	☐
Do you want to save more for future goals?	☐	☐
Do you want to protect your real and personal property from risk?	☐	☐
Do you want to refinance or pay off any loans (such as mortgages or student loans)?	☐	☐
Do you want to refinance, consolidate, or pay off any debts (such as high-interest credit cards)?	☐	☐
Do you have plans for a second home or vacation property?	☐	☐

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LIFESTYLE GOALS	YES	NO
Are you planning to move (such as changing your residence) now or in the future?	☐	☐
Are you planning to purchase or sell a home?	☐	☐
Are you planning to purchase or sell a second home?	☐	☐
Do you want to make a significant home improvement or major purchase?	☐	☐
Do you want to buy or lease a vehicle?	☐	☐
Do you want to plan a large vacation now or in the future?	☐	☐

TAX PLANNING GOALS	YES	NO
Do you want to reduce your tax liability now?	☐	☐
Do you want to reduce your tax liability in the future?	☐	☐
Do you want to support a charity?	☐	☐
Are you planning to sell a business, real estate, or another major asset?	☐	☐

HEALTH CARE GOALS	YES	NO
Do you need to plan for a disability?	☐	☐
Do you want to prepare for long-term care expenses?	☐	☐
Do you want to prepare for future medical expenses?	☐	☐
Do you need to make changes to your health insurance coverage?	☐	☐
Do you want to age in your home and avoid a nursing home?	☐	☐
Do you want to prepare for a possible illness (for either you or spouse)?	☐	☐

ESTATE PLANNING & WEALTH TRANSFER GOALS	YES	NO
Do you want to provide gifts to your children and loved ones during your lifetime?	☐	☐
Do you want to protect your assets from creditors, bankruptcy, or divorce?	☐	☐
Do you want to feel secure that your appointed fiduciaries will carry out your wishes in the event of your incapacity and/or death?	☐	☐
Do you want to ensure that your spouse or other family members are cared for in the event of your death?	☐	☐
Are there charitable organizations that you want to support?	☐	☐
Do you want to ensure your assets pass to your heirs easily?	☐	☐
Do you want to place some restrictions on the assets your heirs will inherit?	☐	☐

MISCELLANEOUS GOALS	YES	NO
Are there any other goals you want to consider that are not addressed above?	☐	☐

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All information has been obtained from sources believed to be reliable, but its accuracy is not guaranteed. There is no representation or warranty as to the current accuracy, reliability or completeness of, nor liability for, decisions based on such information and it should not be relied on as such. Consult your financial or tax professional with questions.

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