



Do any of these apply to you?

- Put a checkmark next to those that are important to you. Which 1-3 are a top priority?

		Not Important	Important	Top Priority
1	To be better off than my peers			
2	To pay for self-improvement (eg, back to school)			
3	To experience the excitement of investing			
4	To start a new business			
5	To buy a home			
6	To help pay for my kid's education			
7	To stop working and do something I love			
8	To go on a dream vacation			
9	To relocate in retirement			
10	To care for aging relatives			
11	To give to charity or other cause			
12	To feel secure about finances in retirement			
13	To feel secure about finances now			
14	To leave an inheritance to loved ones			
15	To retire early			
16	To pay for future medical and long-term cares expenses			
17	To not be a financial burden as I grow older			

Table adapted from [Sin R, et. al. Goals-based financial planning: how simple lists can overcome cognitive blind spots. J Fin Plan. 2019. 32\(7\):34-43.](#)