



Financial Goals Worksheet (Specific)

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TODAY'S DATE (mm/dd/yyyy)

Use this form to help you to specify, quantify, and prioritize your financial goals. Please strive to make your goals as specific as possible. (Examples: retirement, education, charity, second home, wedding). After listing your goals, go back and indicate the priority (1= highest).

A. Name(s)

Please complete the following information.

FIRST NAME M.I. LAST NAME

SPOUSE'S FIRST NAME M.I. LAST NAME

ACCESS ID# (For M&C use only)

B. List and Prioritize Your Goals

Priority

(1 - 10)

A. What? _____ *What is one of your financial goals?*

B. Why? _____ *Why is this goal important to you?*

C. How Much? _____ *How much money would you expect to spend to achieve this goal today? (In total or per year)*

D. When? age *Age* _____ or start date *mm/yyyy* _____ and number of years *#* _____

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

Muhlenkamp respects the time and trust required to complete these forms. Security measures are taken to ensure the confidentiality of your personal information.

B. List and Prioritize Your Goals (Continued)

Priority

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

A. What? _____

B. Why? _____

C. How Much? _____

D. When? age _____ or start date _____ and number of years _____

C. Additional Information
