

Maximize Your Investments

Personalized Financial Goals Worksheet

Everyone has financial goals -- things that we either want or need to be able to afford. Some of these wants or needs may cost more money than others, and more than we have available to spend today. The idea behind investing is that you can take personal savings and grow it to achieve your goal more quickly than just saving alone.

In the spaces below, identify your financial goals and what it will take to achieve them. Since we all need to be able to pay for our own retirement, that goal has been provided as a starting point. Other financial goals could include: home repair/improvement, vacation, a new car, down-payment for a new home, college tuition, a wedding, a baby, starting your own business, etc.

Financial Goal	Want or Need?	Time Horizon (short-term, intermediate term, long-term)	Estimated \$ Amount Needed
<i>Retirement</i>	<i>Need</i>	.	