2025 · MASTER LIST OF GOALS



	RETIREMENT GOALS	YES	NO
\ }	Do you need help deciding when you want to retire?		
\geq	Do you want to retire early?		
$\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	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?		
2	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 i your overall financial health?	mprove	
Do you want to pursue more education or certificat personal or professional reasons?	cions for	
Are you looking for professional advancement (new career, promotion)?	ı job, □	
Do you want to optimize your employee benefits ar compensation package?	nd 🗆	
Do you want to start your own business?		
ASSET & DEBT GOALS	YES	NO
> Do you want to reduce the risk of market volatility investments?	on your	
Do you want to increase the rate of return on your investments?		
Do you want to improve your cash flow (increase in reduce expenses)?	come or	
Do you want to increase the amount you keep in yo emergency fund?	our 🗆	
Do you want to save more for future goals?		
Do you want to protect your real and personal prop from risk?	perty	
Do you want to refinance or pay off any loans (such mortgages or student loans)?	as	
Do you want to refinance, consolidate, or pay off ar (such as high-interest credit cards)?	ny debts 🔲	
Do you have plans for a second home or vacation/ir rental property?	nvestment/	

2025 · MASTER LIST OF GOALS



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 plan for long-term care expenses?		
Do you want to plan 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 need to prepare for a possible illness (for either you or your 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?		