



Goals Checklist

Retirement Goals

- ☐ Do you need help deciding when you want to retire?
- ☐ Do you want to retire early?
- ☐ Do you want to slow down & 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 (& future) financial situation?
- ☐ Do you plan to change your residency in retirement?

Family Goals

- ☐ 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

- ☐ 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 & compensation package?
- ☐ Do you want to start your own business?

Tax Planning Goals

- ☐ Do you want to support a charity?
- ☐ Are you planning to sell a business, real estate, or another major asset?

Lifestyle Goals

- ☐ 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?

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Asset & Debt Goals

- ☐ Are you looking for professional advancement (new job, career, promotion)?
- ☐ Do you want to refinance or pay off any loans (e.g., mortgages or student loans)?
- ☐ Do you want to refinance, consolidate, or pay off any debts (e.g., credit cards)?
- ☐ Do you have plans for a second home or vacation property?

Health Care Goals

- ☐ 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 want to age in your home & avoid a nursing home?
- ☐ Do you want to prepare for a possible illness (either you or your spouse)?

Estate Planning & Wealth Transfer Goals

- ☐ Do you want to provide gifts to your children & 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 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?

Want to talk more?

Schedule a Call