

QUESTIONNAIRE: GOAL IDENTIFICATION

Name(s):

Date:

Use the worksheet below to help identify and organize your goals. To help you get started, here are some commonly used Goal Names: Business Investment, Charitable Gift, Current Lifestyle, Distribution, Education, Endowment, Future Lifestyle, Major Purchase, Parental Support, Retirement, Second Home, Wealth Accumulation and Wealth Transfer.

PRIORITY	TIME FRAME	
	NOW	LATER
WANT TO	<p>Want to Now (example: charitable gift)</p> <p>Goal Name:</p> <p>Goal Amount/Frequency:</p> <p>Time Horizon:</p>	<p>Want to Later (example: second home, business investments)</p> <p>Goal Name:</p> <p>Goal Amount/Frequency:</p> <p>Time Horizon:</p>
HAVE TO	<p>Have to Now (example: parental support, current lifestyle)</p> <p>Goal Name:</p> <p>Goal Amount/Frequency:</p> <p>Time Horizon:</p>	<p>Have to Later (example: college funding, retirement)</p> <p>Goal Name:</p> <p>Goal Amount/Frequency:</p> <p>Time Horizon:</p>