

Life & Financial Goals		
<p><u>What would you like to improve in your life?</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Financial Stability <input type="checkbox"/> Maximize Savings <input type="checkbox"/> Eliminate Bad Debts <input type="checkbox"/> Become a Homeowner <input type="checkbox"/> Have More Free Time to _____ 	<p><u>Additional Worksheets Below</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Income Worksheet <input type="checkbox"/> Expense Worksheet <input type="checkbox"/> Assets/Debts Worksheet <input type="checkbox"/> Financial Concerns Worksheet 	<p><u>Useful Documents</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Credit Report <input type="checkbox"/> Credit Card Statements <input type="checkbox"/> Bank Statements <input type="checkbox"/> Loan statements <input type="checkbox"/> Benefits Statement
<ul style="list-style-type: none"> <input type="checkbox"/> Build and Grow Wealth <input type="checkbox"/> Protect Assets and Dependents <input type="checkbox"/> Prepare for Retirement <input type="checkbox"/> Become More Tax Efficient <input type="checkbox"/> Leave a Legacy 	<ul style="list-style-type: none"> <input type="checkbox"/> Income Worksheet <input type="checkbox"/> Assets/Debts Worksheet <input type="checkbox"/> Retirement Worksheet <input type="checkbox"/> Insurance Worksheet <input type="checkbox"/> Risk Tolerance Worksheet 	<ul style="list-style-type: none"> <input type="checkbox"/> Investment Statements <input type="checkbox"/> Bank Statements <input type="checkbox"/> Taxes & W2s <input type="checkbox"/> Insurance Statements <input type="checkbox"/> Wills/Trusts
<ul style="list-style-type: none"> <input type="checkbox"/> Reduce Costs of Insurance: <ul style="list-style-type: none"> <input type="checkbox"/> Life Insurance <input type="checkbox"/> Health/Dental/Vision Insurance <input type="checkbox"/> Medicare Advantage or Supplements <input type="checkbox"/> Disability or Long-Term Care Insurance 	<ul style="list-style-type: none"> <input type="checkbox"/> Insurance Worksheet <input type="checkbox"/> Assets/Debts Worksheet 	<ul style="list-style-type: none"> <input type="checkbox"/> Insurance Statements
<ul style="list-style-type: none"> <input type="checkbox"/> Start a New Business <input type="checkbox"/> Improve Business Profitability <input type="checkbox"/> Improve Employee Retention <input type="checkbox"/> Prepare for a Transition 	<ul style="list-style-type: none"> <input type="checkbox"/> Business Worksheet <input type="checkbox"/> Assets/Debts Worksheet 	<ul style="list-style-type: none"> <input type="checkbox"/> Business Plan <input type="checkbox"/> Business Contracts <input type="checkbox"/> Employee Benefits Package <input type="checkbox"/> Financial Statements <input type="checkbox"/> Business Account Statements

Other Objectives:

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