

Financial Goals and Objectives

Please rate each of the following financial objectives to reflect your level of interest: (circle your choice)

Goals & Objectives	Importance				
	Most	Very	Some	Little	None
Enhance lifestyle	5	4	3	2	1
Eliminate monthly negative cash flow	5	4	3	2	1
Evaluate debt level	5	4	3	2	1
Purchase major asset	5	4	3	2	1
Build/buy a vacation home	5	4	3	2	1
Accumulate wealth faster	5	4	3	2	1
Reduce taxes	5	4	3	2	1
Reduce or defer income taxes and thus make available more discretionary income	5	4	3	2	1
Maximize the deduction for charitable gifts	5	4	3	2	1
Family protection against death/disability	5	4	3	2	1
Provide adequate income for family if wage earner dies	5	4	3	2	1
Take care of self and family in the event of long-term disability	5	4	3	2	1
Provide for comfortable retirement	5	4	3	2	1
Use tax-wise funding strategies in providing for retirement income needs	5	4	3	2	1
Provide financial independence and adequate resources for retirement years	5	4	3	2	1
Estate conservation	5	4	3	2	1
Minimize current and future transfer taxes	5	4	3	2	1
Preserve and direct the disposition of assets to heirs	5	4	3	2	1
Avoid probate and other administrative costs	5	4	3	2	1
Begin a gift program in favor of children, grandchildren, or others	5	4	3	2	1
Children's education	5	4	3	2	1
Provide a college education fund for children, grandchildren, or others	5	4	3	2	1
To use tax-wise funding strategies to provide for the college education of children	5	4	3	2	1
Other	5	4	3	2	1

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