Life Priorities & Cash Flow

Client Name	Date

Financial Goals - Major Expenses

Description	Importance	Start		Amount	
	High 10 ↔ 1 Low	Year	at Retirement	Ideal	Acceptable
e.g. Renovate Kitchen	8	2010		$45,000	$25,000

Financial Goals - Education

Description	Importance	Start		Amount	
	High 10 ↔ 1 Low	Year	at Retirement	Ideal	Acceptable
e.g. 4 Year College - John	10	2015		$35,000	$20,000

Financial Goals - Other

Description	Importance	Start		Amount	
	High 10 ↔ 1 Low	Year	at Retirement	Ideal	Acceptable
e.g. Support Parents (annual)	5		x	$10,000	$5,000

Please provide the following cash flow items as they are normally not included on client data.

Savings & Expenses

	Annual		Annual
IRA		Home Equity	
IRA - Spouse		Auto Loan	
Education		Life Insurance Premiums	
Short-term Savings		Auto Insurance	
Other -		Home Insurance	
Other -		Medical / Dental Out-of-Pocket	