



## GOAL REVIEW CHECKLIST

Please Update Any Changes Since Your Last Goal Review

✓	Income	Amount
	Salary for each person in your household	
	Any expected bonuses	
	Social Security	
	Pensions	
	Business Income	
	Any other income	

✓	Property	Amount
	Value of Residence	
	Value of other Real Estate	
	Value of other Personal Assets (collector cars, farm equipment, etc.)	
	Business Valuation	

✓	Outside Accounts	Amount
	Outside IRAs, 401ks, and 403bs (including contributions & employer's match %)	
	Other Outside Accounts	
	Checking & Savings Accounts (including CDs)	
	Annuities, Life Insurance, Long Term Care	
	Stock Options	
	529 Plans	

✓	Loans & Expenses	Amount
	Mortgage	
	Credit Cards	
	Student Loans	
	Any other loans (car payments, home improvement loans. Etc.)	
	Major Upcoming Expenses (college, weddings, big vacations, health costs, etc.)	