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# Goal Clarifying

Client Name  Date

***Directions:***

1. *Refer to the “Circle of Life” worksheet to identify your most important life goals. List your life goals in the appropriate category below.*
2. *Next, write a few words (such as “increase security,” “strengthen family ties,” “have fun,” “stretch my comfort zones”) to describe your reason for each goal.*
3. *Now estimate the financial investment required to achieve each goal. A “guesstimate” is fine; these figures can always be refined as you gather more information. In addition, consider the investment of time, energy, and other resources that will be needed.*
4. *After you have completed your lists, assign a priority status of A, B, or C to each goal.*

**Immediate Goals and Priorities**

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| --- | --- | --- | --- |
| **Life Goal** | **Reason** | **Investment** | **Priority** |
|  |  |  |  |
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**Short-Term to Mid-Term Goals and Priorities (1 to 5 Years)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Life Goal** | **Reason** | **Investment** | **Priority** |
|  |  |  |  |
|  |  |  |  |
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**Long-Term Goals and Priorities (5 Years or Longer)**

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| --- | --- | --- | --- |
| **Life Goal** | **Reason** | **Investment** | **Priority** |
|  |  |  |  |
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