

Financial *Life* Planning Institute

Life Goals Profile

Goal Category

Priority Level

Personal / Self

Go back to school to earn a degree or certification	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Hire a coach (Personal, Career, Fitness)	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Lose a significant amount of weight	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Seek professional attention for an important health issue	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Attend a workshop or retreat	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Begin a new hobby	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Take art lessons	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Take music lessons	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Learn a new language	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Go away on a trip	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Other _____	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Other _____	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L

Family: (Parents, Children, Grandchildren, etc.)

Provide long-term care for a family member	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Assist a family member with income needs	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Get married	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Have a baby	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Adopt a child	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Send a family member on a trip	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Miscellaneous purchase for a family member	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Assist a family member with a home purchase	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Fund education expenses for a family member	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Purchase an automobile for a family member	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Save for child's wedding	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Fund funeral expenses for family member	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L
Other _____	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L

Work / Career

- | | | | |
|--|----------------------------|----------------------------|----------------------------|
| Change my career path | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Learn new skills by receiving advanced training or education | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Start my own business | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Form or join a team | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Develop a phased-retirement plan | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Retire from my current job or career | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Begin an experimental career | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Take a sabbatical or leave of absence | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____ | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |

Leisure / Recreation

- | | | | |
|---------------------------------|----------------------------|----------------------------|----------------------------|
| Go on trip(s) | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Purchase a family vacation home | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Save for a family vacation(s) | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Purchase a recreation vehicle | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go on a cruise | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Purchase a motor home | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go away on a hobby-related trip | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go on sailing adventure | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Live in another country | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____ | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |

Charitable / Legacy

- | | | | |
|--|----------------------------|----------------------------|----------------------------|
| Volunteer for a local charitable organization | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Include charity in estate plan | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Create a scholarship fund | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Make ongoing contributions to specific charities | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Go on overseas mission trip | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Create a foundation | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Give to or fund a special project | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Run for political office in my community | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |
| Other _____ | <input type="checkbox"/> H | <input type="checkbox"/> M | <input type="checkbox"/> L |