

# THE MONEYSENSE COMPLETE FINANCIAL PLAN KIT

## WORKSHEET #1: PRIORITIZE YOUR GOALS

Please rate each financial goal based on how important it is to you  
(1 = not at all important; 5 = very important)

	NOT IMPORTANT		VERY IMPORTANT		
	1	2	3	4	5
Paying down mortgage or other debt	1	2	3	4	5
Gaining control over my spending	1	2	3	4	5
Saving for children's education	1	2	3	4	5
Saving for retirement	1	2	3	4	5
Understanding my investments	1	2	3	4	5
Knowing I have the right investment mix	1	2	3	4	5
Active involvement in managing my investments	1	2	3	4	5
Strategies for reducing income taxes	1	2	3	4	5
Maintaining my standard of living in retirement	1	2	3	4	5
Retiring early at age _____	1	2	3	4	5
Developing income withdrawal strategies for/in retirement	1	2	3	4	5
Providing a comfortable lifestyle for my family in the event of my death	1	2	3	4	5
Creating/preserving an estate for my heirs	1	2	3	4	5
Leaving a legacy, philanthropy	1	2	3	4	5

Add any other financial goals or objectives you want to achieve here:

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