

















**Client Profile** (please fill out the below information in regards to your current financial situation)

1. **Current Annual Income**
2. **Current Annual Expenses**
3. **Annual Savings**  
(Retirement and non-retirement)
4. **Personal Assets**
  - **Cash Accounts**
  - **Investment Accounts (retirement)**
  - **Investment Accounts (non-retirement)**
  - **Real Estate & Other**
5. **Total Estimated Liabilities**

## Planning for your Goals What are your financial goals?

Select goals that apply to you, and rank the importance/priority of each goal as a **Need**, **Want** or **Wish**

 Retirement	 Healthcare	 College	 Travel	 Car	 Major purchase	 Private school	 New home
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Celebration	 Wedding	 Provide care	 Start business	 Gift / Donation	 Home improvement	 Leave bequest	 Other
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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### IMPORTANT

This goal sheet is to be used only in conjunction with the Goals-Based Analysis. The Goals-Based Analysis referenced is a tool that provides an additional resource in the evaluation of the potential risks and returns of investment choices. The projections or other information generated by the Goals-Based Analysis regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Investing involves market risk, including possible loss of principal, and there is no guarantee that investment objectives will be achieved.

Suitable investments vary by client, according to his or her goals, objectives, time horizon and risk tolerance, among other factors. Clients should consult with their advisor with respect to their specific situation.

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