

Personal goals and concerns

- A) Read the list below
- B) Circle the three most important points to you
- C) Number them in order of importance

- _____ a. Save Income Tax
- _____ b. Enjoy travel, recreation
- _____ c. Have a business reserve
- _____ d. Education
- _____ e. Have my own business
- _____ f. Buy a Home or Cottage
- _____ g. Pay off mortgage early
- _____ h. Pay off debts
- _____ i. Assure my family's income in case of death or disability
- _____ j. Retire comfortably
- _____ k. Beat the cost of living
- _____ l. Insure my mortgage or other liabilities
- _____ m. Review my Will and Estate
- _____ n. Learn to manage money
- _____ o. Retire early
- _____ p. Learn to invest wisely
- _____ q. Have a financial reserve
- _____ r. Preserve my Estate for my beneficiaries
- _____ s. Other

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