

"When it is obvious that the goals cannot be reached, don't adjust the goals, adjust the action steps."
-Confucius

DEFINE YOUR GOALS: LONG-TERM

MY NAME: _____
(ANSWER ME)

MY START DATE: _____
(ANSWER ME)



HOW YOUNG ARE YOU CURRENTLY?

 (ANSWER ME)

HOW MUCH (\$) IN ASSETS DO YOU CURRENTLY HAVE?

 (ANSWER ME)

WHAT ANNUAL RATE OF RETURN ARE YOU CURRENTLY EARNING?

 (ANSWER ME)

AGE

WHAT AGE ARE YOU TARGETING FOR FINANCIAL FREEDOM?

YOU: I would like to be financially free by age: _____
 (ANSWER ME)

1 _____
2 _____
3 _____



ACTION ITEMS:



HOW MUCH IN TOTAL ASSETS DO YOU NEED FOR FINANCIAL FREEDOM?

YOU: To me, "financial freedom" means this much in assets: _____
 (ANSWER ME)

1 _____
2 _____
3 _____



ACTION ITEMS:



WHAT DO YOU WANT YOUR ROI TO BE?

YOU: I would like to yield the following rate of return from my assets: _____
 (ANSWER ME)

1 _____
2 _____
3 _____



ACTION ITEMS:

 (ANSWER ME)

 (ANSWER ME)

_____ = _____

GOALS LONG-TERM

membership level:
FOUNDATION

