

"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)

**A
G
E**

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)
(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)

**GOALS
LONG-TERM**

membership level:
FOUNDATION

