

Statement of Goals - Date: _____

One Year Goals Financial:

Increase Income to: \$ _____
Reduce Total Debt to: \$ _____
Build Bank Savings Account to: \$ _____
Build Investments to: \$ _____
Real Estate Total: \$ _____
Personal Assets (contents, boat, cars, etc.) \$ _____
Total Assets: \$ _____
Total Net Worth: \$ _____

Five Year Goals Financial:

Increase Income to: \$ _____
Reduce Total Debt to: \$ _____
Build Bank Savings Account to: \$ _____
Build Investments to: \$ _____
Real Estate Total: \$ _____
Personal Assets (contents, boat, cars, etc.) \$ _____
Total Assets: \$ _____
Total Net Worth: \$ _____

One Year Personal Goals:

Physical (exercise, weight reduction): _____
Volunteer work: _____
Vacation: _____
Intellectual (Reading, courses): _____
Spiritual (Scriptural study, prayer): _____
Other: _____

Five Year Personal Goals:

Physical (exercise, weight reduction): _____
Volunteer work: _____
Vacation: _____
Intellectual (Reading, courses): _____
Spiritual (Scriptural study, prayer): _____
Other: _____