

# MY LIFE AND FINANCIAL GOALS WORKSHEET

## My Life and Financial Goals

How would you define or describe your life purpose?

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What are some goals that can help you achieve this life purpose?

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What are some financial goals that can help support your life goals and purpose?

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Short-term financial goals (next 12 months):

1. 

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2. 

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Mid-range financial goals (2–5 years):

1. 

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2. 

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Long-term financial goals (5 years to retirement):

1. 

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2. 

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