

Goals Worksheet

Client Name(s): _____ Date: _____

1. What are the best ways to stay in touch with you? *(check all that apply)*

Email Mail Phone Cell Phone Fax Work Phone

2. How long do you believe you will live in this home?

1-3 years 3-5 years 5-7 years 7-10 years 10+ years

3. Do you have any children?

Yes No If yes, how many? _____ Age(s)? _____

4. What is your target mortgage payment?

\$ _____ This payment is: Comfortable Stretch Well within your affordability range

5. What do you perceive are your biggest financial challenges? *(check all that apply)*

Need to save more Improve spending habits
 Need to increase income Excessive debt
 Feeling I'm paying too much tax Other _____

6. Do you currently have plans for any major purchase/expense in the next 12 months?

New Car Home Improvements
 College/University Rental Properties
 Medical Other _____

7. What is your estimated retirement age? _____

8. In respects to your retirement planning, do you feel you are:

Ahead of where you need to be Behind where you need to be
 On par with where you need to be

9. Of the following financial goals, which are priorities for you right now? *(select all that apply)*

Improve monthly cash flow Tax reduction strategies
 Maximize retirement savings Maximize investment contributions
 Maximize education savings Maximize asset portfolio performance
 Live on one income Real estate investment
 Create a comprehensive financial plan Pay off non-preferred debt
 Create a larger (6-12 months income) emergency reserve account Other _____

10. Which of the following are the most important to you regarding your mortgage financing?
(select all that apply)

- Determine the maximum purchase price and loan amount I qualify for
- Determine purchase price and loan amount appropriate for my income and lifestyle
- Obtain a targeted monthly mortgage payment _____ (please specify)
- Purchase a home within a specific price range
- Have the choice to sell, pay down, or refinance home without penalty
- Avoid mortgage insurance
- Qualify for new home prior to or without sale of existing home
- Other _____

11. How do you expect your lifestyle to change over the next few years?

12. On a scale of 1-10 (10 being the best), please rate your current level of satisfaction in the following areas:

- | | |
|--|--|
| _____ Debt Management Knowledge | _____ Financial Planning Services by Professionals |
| _____ Income Tax Services by Professionals | _____ Life Insurance options |
| _____ Knowledge of Wills, Trust, etc. | _____ Estate Planning professional |
| _____ Legal Advice for your personal matters | _____ Homeowners and auto insurance service |

13. Would you be interested in information about debt reduction or wealth building strategies?

- Yes No

14. Do you have interest in purchasing real estate for investment purposes some time in the future?

- Yes No

15. Are you currently working with a financial advisor?

- Yes No

16. Do you have any other questions for me about the mortgage planning process or loan process?

- Yes No

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