

Financial Goals

Date: _____

GIVING GOALS

Would like to give _____ percent of my income.

Other giving goals: _____

DEBT REPAYMENT GOALS

Would like to pay off the following debts first:

Creditor	Amount
_____	_____
_____	_____
_____	_____
_____	_____

EDUCATIONAL GOALS

Would like to fund the following education:

Person	School	Annual Cost	Total Cost
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other educational goals: _____

LIFESTYLE GOALS

Would like to make the following major purchases: (home, automobile, travel, appliances)

Item	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Would like to achieve the following annual income: _____

SAVINGS AND INVESTMENT GOALS

Would like to save ____ percent on my income.

Other savings goals: _____

Would like to make the following investments:

Investment

	Investment
_____	_____
_____	_____
_____	_____

Would like to provide my/our heirs with the following: _____

STARTING A BUSINESS

Would like to invest in or begin my/our own business: _____

Describe your standard of living you sense would please the Lord.

