

# Financial Goals

Prepared By:

Date:

## 1 Client Information

Client \_\_\_\_\_ Spouse/Partner \_\_\_\_\_  
DOB \_\_\_\_\_ DOB \_\_\_\_\_

## 2 Client Goal

What is Your Financial Goal? \_\_\_\_\_

Type of Goal: Savings  Income  Target Year \_\_\_\_\_

Target Investment Value \$ \_\_\_\_\_

Current Investment Value\* \$ \_\_\_\_\_ Cost Base \$ \_\_\_\_\_

Rate of Return\* \_\_\_\_\_ % Marginal Tax Rate \_\_\_\_\_ %

Cash Flow\* \$ \_\_\_\_\_ Cash Flow Frequency: Annual  Monthly

Timing: Beginning of Period  End of Period  Index \_\_\_\_\_ %

## 3 Spouse/Partner Goal

What is Your Financial Goal? \_\_\_\_\_

Type of Goal: Savings  Income  Target Year \_\_\_\_\_

Target Investment Value \$ \_\_\_\_\_

Current Investment Value\* \$ \_\_\_\_\_ Cost Base \$ \_\_\_\_\_

Rate of Return\* \_\_\_\_\_ % Marginal Tax Rate \_\_\_\_\_ %

Cash Flow\* \$ \_\_\_\_\_ Cash Flow Frequency: Annual  Monthly

Timing: Beginning of Period  End of Period  Index \_\_\_\_\_ %

\*You will have the option to solve this value to achieve the stated financial goal.