

My Key Goal

- » Primary Priority: _____
- » Other Key Priorities: _____
- » When Do I Expect to Reach My Goal? _____
- » How Many Years Do I Expect to Spend on This Goal? _____
- » How Much Do I Expect to Need in Savings? _____

My Ability to Tolerate Risk

- » Will downward moves in the market ...
 - ... hurt my chances of achieving my goal? _____
 - ... cause me to pull out of stocks? _____
 - ... impact my ability to take withdrawals in the next 3 to 5 years? _____
- » How big of a threat is long-term inflation to achieving my goal? _____

My Appropriate Allocation

☐ Conservative ☐ Moderate ☐ Aggressive

- » Rationale: _____

My Investing Preferences and Constraints

- » Accounts I Will Use: _____
- » My Constraints: _____
- » Preferred Types of Investments: _____
- » Tax Considerations: _____
- » Use an Adviser or Planner? _____
- » Other: _____

My Investment Selection and Management Rules

- » _____
- » _____
- » _____
- » _____

My Monitoring Process

- » Frequency: _____
- » Allocation: _____
- » Progress: _____
- » Life-Stage Changes: _____