

PRISM WEALTH-BUILDING PROCESS

P | **Prioritizing Your Goals**

List of all of your financial goals below, ranked in the order of importance. Estimates can be used if there is uncertainty about the date of when the goal will be reached, its cost and/or its spending duration.

Goal	Number of Years Away	Spending Duration	Priority	Estimated Cost	Comments
			1		
			2		
			3		
			4		
			5		

Notes:

Goal is what you plan to do with money. Goals can include, but are not limited to, funding retirement, leaving an inheritance, donating to a charitable or religious organization, paying for a child's or grandchild's college, building emergency savings and paying off debt.

Number of Years Away is the amount of time between now and when the goal must be funded.

Spending Duration is the length of time you expect to spend cash on the goal.

Priority is the numerical ranking of how important each goal is.

Estimated Cost is the amount you expect you will need for the goal.

Comments are any notes about the goal you want to list.