

Creating Meaningful Financial Goals

When mapping out your financial future, creating financial goals derived from your dreams is just as critical as the saving part itself. Without specifically defined goals based on authentic desires, it is very easy to use your money for immediate gratification instead of saving for the future. As you progress through different life stages, allocate time each year to make sure you are thinking about what you want to achieve with your money. Use this Dream Worksheet to help you define meaningful financial goals.

<i>Dreams</i>	Write Down Your Top 10 Dreams You Want to Achieve During Your Lifetime
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Clear Path Financial Planning is a Registered Investment Advisor offering advisory services in the State of Connecticut and in other jurisdictions where exempted.

Dream Worksheet

TOMMY MARTIN

Specify Your Most Important Dreams and Turn Them Into Attainable Goals

SHORT TERM

Short Term Goals (1 year)	Start Date	Target Date	Total Cost	Monthly Savings	How To Achieve	Immediate Action	Values Achieved
Pay off credit cards	August 2012	August 2013	\$6,000	\$500	Add'l debt payments of \$200/month	Review all debts	Peace of mind

MID TERM

Mid Term Goals (2-5 years)	Start Date	Target Date	Total Cost	Monthly Savings	How To Achieve	Immediate Action	Values Achieved
Save for home down payment	August 2012	August 2017	\$50,000	\$800	Set up automatic savings plan	Open separate home account	Security

LONG TERM

Long Term Goals (5+ years)	Start Date	Target Date	Total Cost	Monthly Savings	How To Achieve	Immediate Action	Values Achieved
Financial Independence at age 65	August 2012	January 2042	\$2M	\$2,200	Set up automatic savings plan into growth investments	Open up IRA	Freedom & Security

After completing your Dream Worksheet, talk with Tommy to ensure your financial strategy factors in your short-term, mid-term and long-term financial goals.

To learn more about Tommy Martin's company, Clear Path, visit www.clearpathria.com

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