



## *Priority Analysis*

Identify with a "1", "2" and "3" your top 3 priorities for the next six (6) months:

1. Developing a Spending Plan (Budget) \_\_\_\_\_
2. Personal Debt Elimination \_\_\_\_\_
3. Establishing an Emergency Fund / Opportunity Savings Fund \_\_\_\_\_
4. Estate Planning – Wills & Trusts \_\_\_\_\_
5. Career Planning \_\_\_\_\_
6. Retirement Planning / Financial Independence Planning \_\_\_\_\_
7. Investment Planning \_\_\_\_\_
8. Purchase a Home \_\_\_\_\_
9. Other Goals \_\_\_\_\_

What specific issues would you like to discuss during your complimentary 30 min consultation?

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