Lifestyle Goals

COLLINS FINANCIAL GROUP

Name:

Short Term Goals (1 to 5 years)	Month /Year	Today's Dollar Cost	Once off or ongoing (If ongoing please elaborate how often and period to finish)	Rank Priority (High-Medium-low)
Medium Term Goals (6-10 Years)				
Long Term Goals (11+ Years)				

Priority Rating

HIGH: Must be in plan.

MEDIUM: Would Prefer if it is in the plan

LOW: Does not matter if it is in the plan