

## ***Prioritizing Financial Concerns Worksheet***

Given your current financial situation and your goals and objectives, rank the following items in order of concern (1 = most important, 10 = least important. Ask your spouse, partner, or significant other to also rank their concerns and work to reconcile any differences you have in priorities. A meeting of the minds as to goals and objectives is the starting point for financial security and success.

- \_\_\_\_\_ To have sufficient funds to cover both day-to-day living expenses and planned for future needs.
- \_\_\_\_\_ To minimize income taxes.
- \_\_\_\_\_ To retire at a desired standard of living.
- \_\_\_\_\_ To maximize my estate so as to pass along as much as possible to my heirs.
- \_\_\_\_\_ To accumulate sufficient funds to increase my standard of living.
- \_\_\_\_\_ To accumulate enough funds to acquire a business.
- \_\_\_\_\_ To accumulate enough funds to acquire a vacation home.
- \_\_\_\_\_ To enable my family to maintain their standard of living in the event of my untimely death.
- \_\_\_\_\_ To establish an education fund for my children.
- \_\_\_\_\_ Other \_\_\_\_\_

Material provided by Michael P. Griffin.