2023 · MASTER LIST OF GOALS

RETIREMENT GOALS	YES	NO
Do you need help deciding when you want to retire?	☐	☐
Do you want to retire early?	☐	☐
Do you want to slow down and work part time (semi-retire)?	☐	☐
Do you want to take sabbaticals during your career?	☐	☐
Do you want to feel confident about your plans for retirement?	☐	☐
Do you want to feel confident about your retirement income sources (e.g., investment accounts, retirement plans, pension plans, Social Security)?	☐	☐
Do you want to feel confident about your current (and future) financial situation?	☐	☐
Do you plan to change your residency in retirement?	☐	☐

FAMILY GOALS	YES	NO
Do you want to have or adopt a child?	☐	☐
Do you want to save for a child or relative's education?	☐	☐
Do you want to save for any family milestones (e.g., bar/bat mitzvahs, graduations, weddings)?	☐	☐
Do you want to support family members who may require special needs planning?	☐	☐
Do you have any parents or other family members you want to care for?	☐	☐
Do you have plans to change your marital status?	☐	☐

SELF-DEVELOPMENT & PROFESSIONAL GOALS	YES	NO
Do you want to achieve financial independence or improve your overall financial health?	☐	☐
Do you want to pursue more education or certifications for personal or professional reasons?	☐	☐
Are you looking for professional advancement (new job, career, promotion)?	☐	☐
Do you want to optimize your employee benefits and compensation package?	☐	☐
Do you want to start your own business?	☐	☐

ASSET & DEBT GOALS	YES	NO
Do you want to reduce the risk of market volatility on your investments?	☐	☐
Do you want to increase the rate of return on your investments?	☐	☐
Do you want to improve your cash flow (increase income or reduce expenses)?	☐	☐
Do you want to increase the amount you keep in your emergency fund?	☐	☐
Do you want to save more for future goals?	☐	☐
Do you want to protect your real and personal property from risk?	☐	☐
Do you want to refinance or pay off any loans (such as mortgages or student loans)?	☐	☐
Do you want to refinance, consolidate, or pay off any debts (such as high-interest credit cards)?	☐	☐
Do you have plans for a second home or vacation/investment/ rental property?	☐	☐

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2023 · MASTER LIST OF GOALS

LIFESTYLE GOALS	YES	NO
Are you planning to move (such as changing your residence) now or in the future?	☐	☐
Are you planning to purchase or sell a home?	☐	☐
Are you planning to purchase or sell a second home?	☐	☐
Do you want to make a significant home improvement or major purchase?	☐	☐
Do you want to buy or lease a vehicle?	☐	☐
Do you want to plan a large vacation now or in the future?	☐	☐

TAX PLANNING GOALS	YES	NO
Do you want to reduce your tax liability now?	☐	☐
Do you want to reduce your tax liability in the future?	☐	☐
Do you want to support a charity?	☐	☐
Are you planning to sell a business, real estate, or another major asset?	☐	☐

HEALTH CARE GOALS	YES	NO
Do you need to plan for a disability?	☐	☐
Do you want to plan for long-term care expenses?	☐	☐
Do you want to plan for future medical expenses?	☐	☐
Do you need to make changes to your health insurance coverage?	☐	☐
Do you want to age in your home and avoid a nursing home?	☐	☐
Do you need to prepare for a possible illness (for either you or your spouse)?	☐	☐

ESTATE PLANNING & WEALTH TRANSFER GOALS	YES	NO
Do you want to provide gifts to your children and loved ones during your lifetime?	☐	☐
Do you want to protect your assets from creditors, bankruptcy, or divorce?	☐	☐
Do you want to feel secure that your appointed fiduciaries will carry out your wishes in the event of your incapacity and/or death?	☐	☐
Do you want to ensure that your spouse or other family members are cared for in the event of your death?	☐	☐
Are there charitable organizations that you want to support?	☐	☐
Do you want to ensure your assets pass to your heirs easily?	☐	☐
Do you want to place some restrictions on the assets your heirs will inherit?	☐	☐

MISCELLANEOUS GOALS	YES	NO
Are there any other goals you want to consider that are not addressed above?	☐	☐

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Next Play Financial Solutions, LLC

Fee-only **financial planning and investment management services** to improve your financial outlook now and in the future. At Next Play Financial, we provide recommendations tailored to your unique circumstances utilizing innovative planning software to see all your accounts in one place.

Next Play Financial Works With Individuals Over 50

You have worked hard in your career, and are ready for relaxation and celebration. However, the transition from a career and steady paycheck to living on the wealth you've accumulated can be filled with uncertainty. Together, we'll develop a plan that helps you accumulate wealth while you're still working, and aid your transition to retirement income.

Next Play Financial Works With Independent Women

From career-woman to wife/partner, from caring for children to caring for aging parents, from wealth accumulation to planning for retirement, through separation, divorce, and becoming widowed – women go through many transitions during a lifetime. Through all these changes, women often have additional demands put upon them and Next Play Financial is here to help women navigate through those transitions with support, education, and recommendations.

Next Play Financial has no incentive to give you advice or invest your money in a product in order to earn a commission. Without this conflict of interest, Next Play Financial will help you make financial decisions according to what is best for you and your situation.

Get in touch to schedule an introductory meeting today!

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