Life goals profile

Goals are dreams and aspirations that you would like to have happen sometime in the future. It can be beneficial to explore these dreams and aspirations in greater detail and plan for them accordingly. Although dealing with the transitions that you are experiencing is critical, you should not overlook the importance of setting goals.

Thinking about how you want to live and how you think your money should support your ambitions is a key component of the financial life planning process. By understanding how specific goals fit into the larger picture of your life, we can work together to better align your financial goals with your life's purpose and guiding principles.

1. What would you do differently if you had more free time?

2. What would you do differently if you had more money?

3. What dreams do you have that you fear you may not achieve?

4. What do you envision your day to look like in retirement?

5. How much and what kind of work do you want to do in retirement?

6. Do you know someone who you consider to be a role model for retirement? Please describe what makes them a role model.

→

7. What type of legacy do you want to leave for your family?

8. Are there charities that you would like to become involved with, either by making a donation or volunteering?

© 2011 The Vanguard Group, Inc. All rights reserved.