

NEW or DREAM
C A R

GIVING TO
CHARITY

EDUCATION
COSTS

FUTURE
FAMILY

HELPING
FAMILY WITH
MONEY

NEW, SECOND or IMPROVE
H O M E

LEAVE A
LEGACY

LONG-TERM
MEDICAL CARE
& COSTS

MAINTAINING
LIFESTYLE

NOT RUNNING
OUT OF MONEY

RETIRE
EARLY/SOON

T R A V E L

UNIQUE
COLLECTION

WEDDING
COSTS



GOALS

ACHIEVEMENT
(SUCCESS)

ADVENTURE
(FUN, HUMOR)

BALANCE
(INNER HARMONY)

COMMUNITY

COMPASSION
(KINDNESS)

CREATIVITY

FAITH
(SPIRITUALITY)

FAMILY

FREEDOM

FRIENDSHIPS

GROWTH
(LEARNING)

HEALTH

KNOWLEDGE

LOYALTY

LOVE

PEACE

RESPECT
(STATUS)

SECURITY
(STABILITY)

VALUES