



GOAL SETTING: TAKING THE FIRST STEP TOWARD GETTING WHAT YOU WANT

1. Complete the following statement:

By the time I complete the BDO Dunwoody New Beginnings program, I want my life to be different in the following ways:

2. In addition to eliminating your debt, which of the following long-term financial goals are important to you? (check as many as apply)

- | | |
|--|--|
| <input type="checkbox"/> Establish savings | <input type="checkbox"/> Buy life insurance |
| <input type="checkbox"/> Buy a home | <input type="checkbox"/> Take a vacation |
| <input type="checkbox"/> Buy a car | <input type="checkbox"/> Save for children's education |
| <input type="checkbox"/> Start an investment program | <input type="checkbox"/> Reduce income taxes |
| <input type="checkbox"/> Secure retirement savings | <input type="checkbox"/> Re-establish credit rating |
| <input type="checkbox"/> Other _____ | |

3. Which of the following immediate changes might be important for you to make to reach your financial goals?

Short Term Goal	Yes?	Priority Rank*
Spend within my means		
Become a more careful shopper		
Improve my credit rating/score		
Become more aware of where my money is going		
Save money every time I get paid		
Construct a plan for eliminating all my debt		
Construct an income and spending plan		
Become better organized in my record keeping		
Distinguish better between my needs and wants		
Pay my bills and taxes on time		
Get some good financial advice		

** Rank the changes that you checked off above to indicate the order of their importance to you **

4. Describe some other goals that you have for yourself and for your family in terms of each of the following areas.

(Some goals are suggested just to give you a start and may be changed).

Self
1. Manage my time better
2.
3.
Children/Family
1. Spend more time together
2.
3.
Marriage/Relationship
1. Improve communication
2.
3.
Job/Career
1. Earn more income
2.
3.
Emotional/Spiritual
1. Reduce stress
2.
3.