



Goals and Major Expenditures in Your Second Half of Life: A Timeline

Think about each area below. If you have a goal or intent related to the category, list it in the appropriate box under the time frame that you would like this to occur. If it has a dollar (\$) cost, include the dollar (\$) cost. Also include any major expenditures that are not frequent, recurring but may be necessary, such as a new car, roof repair, house painting, etc. After you make your list, prioritize the items by numbering them in order of importance to you. (You won't have something in every box – just where you have a goal or expense coming up.)

Total the amounts for each time frame. These are funds in addition to your regular expenses that you will need to either save for or earmark funds towards. You may find that you'll need to reduce your regular spending in order to have the funds for the goals and major expenditures on this list. Use this in your conversation with your financial planner.

Name: _____

Date: _____

	1-12 Months	2-3 Years	4-5 Years	6-10 Years	11-20 Years	Lifetime
Family/ Relationships						
Home/ Environment						
Leisure/Toys/ Recreation						
Education/ Personal Development						
Work/ Career						
Charitable/ Gifting						
Community/ Spiritual						
Other:						

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