

Ultimate End Result

	8 years from now (Summer 2019)
	Matt 55
	Brenda 54
Parameters	
Career	Working in a fulfilling role in a company I am proud of
	Be in a leadership role where my contributions are valued
	Helping others fulfill their potential
	Not concerned about losing job or aging out
	Run interesting side business part-time
Parenting	Both kids completed college - Madison done with Grad school
	Both kids with good jobs and living independently
Financial	Salary enough to live comfortably
	Enough extra income to help kids if needed
	On track for comfortable retirement even with no social security
	Own assets bringing in additional \$60K yearly of passive income
Health	Good health
	At a reasonable weight where I feel comfortable
	Eating healthy choices
	Exercise at least 4 times a week
Location	May still live in current home
	If haven't already moved, then identified new community
	Nice weather - not too hot, cold or humid
	Near a city, access to shopping and events
	Safe, friendly community
	Low maintenance home with substantial property
	Nature nearby to walk and enjoy
	Affordable
Personal	Travel regularly
	Attend sporting events frequently
	Volunteer in the community in something I enjoy
	Enjoy community and cultural events monthly