

# Client/Planner Worksheet for Establishing Financial Direction

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_

## FINANCIAL MISSION:

1. Educate the client as to what a financial mission is and the importance of it being broad and enduring.
2. Working with your client, develop a financial mission that your client is willing to embrace.

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## Financial Goals & Objectives:

1. Discuss and explain common financial goals with the client.
2. Identify goals the client is interested in achieving.
3. Write client objective under appropriate goal classification.
4. Ensure all “need” objectives have been identified and documented.
5. Classify each objective as a want or a need; remember to remain objective.
6. For each “want” objective, the client must assign a weight between 1 and 5 (1 = objective would be nice to have, 5 = objective is of great importance).

Goal:		
Objectives:	Need	Want
	#	#
	#	#
	#	#

Goal:		
Objectives:	Need	Want
	#	#
	#	#
	#	#

Goal:		
Objectives:	Need	Want
	#	#
	#	#
	#	#

Goal:		
Objectives:	Need	Want
	#	#
	#	#
	#	#

Planner's Name: \_\_\_\_\_