



# GETTING STARTED

## BEFORE WE MOVE FORWARD

There are a few important questions to consider before you develop your own financial plan.

1. What are your short-term goals for the next 1-5 years?

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2. What are your long-term goals for 5 or more years from now?

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Do the following statements apply to you? Select yes or no for each one.

I need to establish a savings plan for my child(ren)'s college or trade school. Yes No

My family has a budget and we stay within our budget each month. Yes No

I could come up with \$2,000 in the next 30 days if needed. Yes No

I have a savings plan education of my child(ren). Yes No

I have a specific savings goal I want to achieve (vacation, new car). Yes No

I want to build or repair my credit. Yes No

I want to buy a new home. Yes No

I am thinking about buying a new car. Yes No

If I were faced with an unexpected expense today I have a plan to fund it. Yes No

If something were to happen to me, I have a will or trust set up for my family. Yes No