

Ready, Set, Goal!

Setting goals can be a tough task, but it is an important step toward securing your financial future. Before we create a financial plan, we'll work together to define and document your goals. Here's a primer to help you get started:



DETERMINE YOUR PRIORITIES

Think honestly about the life you envision for you and your loved ones. Don't just ask yourself what you are trying to achieve. Map out how you will get there. Be specific about these steps and record them as they are the basis for your goals.



BE REALISTIC

Set specific timeframes for accomplishing your goals. Ask yourself, "Can I actually accomplish this, or do I need to rethink things?"



TRACK YOUR PROGRESS

The Goals tab on your personal financial management site is a great tool to help you stay focused on your goals. You can add your goals, assign accounts to fund those goals, and monitor your progress toward reaching them.



MAKE ADJUSTMENTS BASED ON DATA

We'll work with you to model what-if scenarios and give you visibility into how small changes—such as delaying retirement or refinancing your home—can affect your goals.



ASK FOR HELP

When the unexpected occurs, your financial plan provides a foundation to make decisions. We can provide expert advice when you need it and refer back to your original goals to help you make informed decisions.



STICK WITH IT

Following a financial plan is an ongoing event. Your plan is the roadmap to help you achieve the financial future you envision for yourself. We'll work together to document your plan, refine it as needed, and help you stick to it and tax filing dates.