



As you go through different stages of life, your financial goals will likely change. What is right for your money right now, may not be right for you 10 or 20 years from now. Our Credit Union team of experts can help you balance what you need to do today to prepare for tomorrow.

To assist us with creating a plan that consists of your priorities, please select your goals, then place them in priority sequence with 1 being most important.

Goal Planning

Select

Rank

- _____ **Short Term Savings (Emergency Funds, 3 Months Expenses, 10%)**
Plan or date to address:
- _____ **Saving For Children's Education**
Plan or date to address:
- _____ **Saving For A Major Purchase (Car, Down Payment, Renovations)**
Plan or date to address:
- _____ **Saving For Retirement**
Plan or date to address:
- _____ **Planning For/In Retirement**
Plan or date to address:
- _____ **Buying A Home**
Plan or date to address:
- _____ **Paying Off Debt**
Plan or date to address:
- _____ **Protecting Family And Assets (Estate Planning, Protection Planning)**
Plan or date to address:
- _____ **Starting A Business**
Plan or date to address: