

GOAL CHECKLIST

The following information is required when planning for the following goal:

CAR

1. What is the cost or value of the car you wish to purchase? _____
2. What type & year of car do you wish to purchase?

Type _____ Year _____
3. Are you buying the car cash ? _____
4. Will you be taking a loan? Yes _____ No _____
5. If Yes, what is the deposit required? \$ _____
6. When do you want to buy the car? _____
7. How much do you already have invested /would you be able to invest towards purchasing the car? _____

YOUR GOALS. FULL STOP.



GOAL CHECKLIST

The following information is required when planning for the following goal:

HOUSE

1. What is the cost or value of the house you wish to purchase? _____
2. Are you buying the house cash _____
3. Will you be using a combination of cash and a mortgage? Yes _____ No _____
4. If yes, are you eligible for NHT benefit? _____
5. If yes, what amount ? _____
6. What options will you consider to obtain additional mortgage? _____
7. How much are you able to receive from the building society? _____
8. What is the monthly mortgage payment? _____
9. What is the deposit amount required? _____
10. What is the closing cost amount required? _____
11. When do you want to buy the house? _____
12. How much do you already have invested /would you be able to invest towards the deposit / purchasing the house? _____

YOUR GOALS. FULL STOP.



GOAL CHECKLIST

The following information is required when planning for the following goal :

EDUCATION

1. Which school or college would you like to send yourself or child?

2. What is the tuition cost _____/semester/term/year
3. Are you paying the full cost of the tuition? **Yes**_____ **No** _____
4. If No, will you be seeking assistance through student's loan? _____
5. If Yes (to Ques.4), what is the value of the loan you are seeking? _____
6. Will you be applying for a scholarship? _____
7. If yes, what is the value of the scholarship? \$ _____
8. When will you/your child commence school? _____
9. How old are you / your child now? _____
10. How much do you already have invested /would you be able to invest towards your / your child's education? _____

The following information is required when planning for the following goal:

YOUR GOALS. FULL STOP.



GOAL CHECKLIST

RETIREMENT

1. At what age do you plan to retire? _____
2. How long do you plan to be in retirement? _____
3. What are your current monthly expenses? _____
4. Do these expenses include mortgage, school fees or any loans? _____
 - a. If yes, state what amount (s)?

 - b. _____
 - c. _____
5. How much do you already have invested /would you be able to invest towards your retirement? _____

The following information is required when planning for the following goal:

YOUR GOALS. FULL STOP.



GOAL CHECKLIST

STARTING A BUSINESS

1. What type of business are you thinking of starting? _____
2. When do you plan to start? _____
3. How will the business be financed? _____
 - a. Venture Capital _____
 - b. Sole Trader /Own resources _____
 - c. Partnership _____
 - d. Commercial Bank /Credit Union _____
4. How much do you already have invested /would you be able to invest towards the new business? _____

The following information is required when planning for the following goal:

YOUR GOALS. FULL STOP.



GOAL CHECKLIST

VACATION

1. When do you plan to take the vacation? _____
2. What is the cost or value of your vacation? _____
3. Where do you plan to go for your vacation? _____
4. Are there any other options /alternatives you would consider for your vacation ?
 - a. _____
 - b. _____
 - c. _____
5. How much do you already have invested /would you be able to invest towards your vacation? _____

YOUR GOALS. FULL STOP.

