

# 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? \_\_\_\_\_

**YOUR GOALS. FULL STOP.**

# GOAL CHECKLIST

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

## 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? \_\_\_\_\_

**YOUR GOALS. FULL STOP.**



# GOAL CHECKLIST

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

## 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? \_\_\_\_\_

**YOUR GOALS. FULL STOP.**

# GOAL CHECKLIST

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

## 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.**

