## BARROWS TROSTLE ADVISORS, LLC

DENISE B. BARROWS, CPA, CFP<sup>®</sup>

Financial Advisor

PHILIP G. TROSTLE, CPA/PFS, MBA

Financial Advisor

## FINANCIAL GOALS WORKSHEET

Print, complete, and bring to your meeting.

Check your goals and then rank them by priority.	Important (Check)	Your Rankings (1-10) (10=Highest)
Finance Children's Education  Buy a new home (primary or vacation)  Buy a new car/boat/furniture/other personal property  Travel extensively  Reach the proper level of insurance protection for self and far Save for retirement  Reduce/eliminate debt  Set up a reserve/emergency fund  Be financial independent at age:  Substantially contribute to favorite charity/institution  Invest in the stock market  Help support elderly parent(s)  Invest in real estate (land, rental property)  Start/buy/expand own business  Start a formal retirement plan for my business  Leave large estate for children  Other:  Other:  Other:  Goal Listing		
Below is a list of my/our financial goals, in order of important  1	139 Baltimore Street	

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