

My Financial Goals Are.....

PRIORITY	GOAL
	1. My most important financial worry at this moment in time is _____.
	2. I want to retire when I'm _____ years old.
	3. I want to have R _____ per month when I retire (in today's money).
	4. When I die, I want to leave R _____ to my dependents, as a lump sum, or as a monthly pay out.
	5. I would like R _____ as a lump sum paid out to me if I should contract a severe illness (6 month's salary is a good starting point).
	6. I would like R _____ as a lump sum paid out to me if I should become disabled (6 month's salary is a good starting point).
	7. I have a current will in place: Yes / No
	8. My current emergency fund is sitting at R _____ and I would like it to be R _____ (3 – 6 month's salary).

Name: _____ Date: _____

Signature: _____