

Making Dreams a Reality

Most of us have goals for the future and reaching some of them may depend on how smart we are with our money. Making our dreams a reality will take some financial planning and smart investing. Investing is about saving your money and making it grow. Typical investments include stocks, mutual funds, bonds and GICs.

Financial Goals Worksheet

Within five years, I'd like to:

\$\$ Needed

Goal #1: _____

\$ _____

Goal #2: _____

\$ _____

Within 10 years, I'd like to:

Goal #3: _____

\$ _____

Goal #4: _____

\$ _____

Long term, beyond 10 years, I'd like to:

Goal #5: _____

\$ _____

Goal #6: _____

\$ _____