

# Goal Jogger

1. How much did you earn last year? \_\_\_\_\_
2. How much would you like to earn this year? \_\_\_\_\_
3. Do you currently own your own home or do you rent? \_\_\_\_\_
4. What would be your dream home and where would this be? \_\_\_\_\_  
\_\_\_\_\_
5. What kind of car do you drive? \_\_\_\_\_
6. What would you consider your dream car? Describe in detail, color, model, make, interior, etc. \_\_\_\_\_
7. If you were given the opportunity to help any person(s) in your life financially, who would this be and what would be you and why? \_\_\_\_\_  
\_\_\_\_\_
8. Do you currently own any investments? \_\_\_\_\_
9. Who does your life insurance? \_\_\_\_\_
10. Within the past 60 days have you examined your credit report? What was your FICO Score? \_\_\_\_\_
11. Have you struggled with any tax issues that might be need solving? \_\_\_\_\_
12. What is your biggest pressing financial need at this moment, and how much would it take to solve it?
13. Why are you here? What would you do to accomplish your goals? \_\_\_\_\_  
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