



Polaris Financial Strategies Group

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Goals Worksheet

Retirement Age:

Ideal _____ Acceptable _____ Priority

Retirement income:

Ideal _____ Acceptable _____ Priority

Dreams and major purchases:

Ideal _____ Acceptable _____ Priority

Education goals:

Ideal _____ Acceptable _____ Priority

Estate and legacy:

Ideal _____ Acceptable _____ Priority

Today vs. tomorrow:

Ideal _____ Acceptable _____ Priority

Risk tolerance:

Ideal _____ Acceptable _____ Priority

Helping Clients Navigate Their Future Through Investment Planning

Securities and advisory services offered through Commonwealth Financial Network, member FINRA/SIPC, a Registered Investment Adviser

