

Your goals are our top priority

Use the drop down menus for these goals exploration topics to rank order those that are priorities to you. There is space to include notes about your priorities on the following page. *Once complete, don't forget to save this document.*

 <p>lifestyle spending PRIORITY</p>	 <p>dreams & major purchases PRIORITY</p>	 <p>education PRIORITY</p>
 <p>family protection PRIORITY</p>	<p>business PRIORITY</p>	 <p>estate & legacy PRIORITY</p>
 <p>risk tolerance PRIORITY</p>	 <p>taxes PRIORITY</p>	 <p>retirement PRIORITY</p>
 <p>charitable & philanthropic PRIORITY</p>	 <p>health care PRIORITY</p>	 <p>provider care PRIORITY</p>

lifestyle spending

dreams & major purchases

education

family protection

business

estate & legacy

risk tolerance

taxes

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charitable & philanthropic

health care

provider care

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