



Taking Stock Worksheet

TD Wealth for Women



One of the keys to a successful financial future is to determine your future goals, assess your current circumstances, and seek the guidance you need to get there. Below are some questions that can help you get started and, with the assistance of an investment professional, devise a plan to help achieve financial security.

Step 1: Define personal goals

What are your top three personal goals?

Goal 1:

Goal 2:

Goal 3:

Some common personal goals may include:

Family

- Spend more time with loved ones
- Pay for a child's post-secondary education
- Provide a unique experience for my family (e.g. trip)

Professional life

- Retire in X years
- Advance/change career or start a business
- Complete a course or degree

Health and well-being

- Improve my health
- Reduce stress
- Volunteer

Financial independence/security

- Retire when I want
- Become debt-free
- Afford trips, a second home, etc.

Home

- Move to a new location
- Buy a vacation property
- Become mortgage-free

Lifestyle

- Travel
- Hobbies

Legacy

- Leave an estate to heirs
- Philanthropy

Step 2: Take stock

Now let's take note of some of the most important details about your life that can assist in building a financial plan. Each category below provides sample questions for your consideration as you take stock of your personal circumstances.

Considerations

Your story

Family

- Describe the composition of your family
- Is your family currently facing any significant challenges?
- Do you have specific family goals?

Career/work

- Describe your current work circumstances
- Do you have a plan in place if your current source of income was no longer available?
- Do you have plans to leave your current job?

Well-being

- Do you or anyone in your family have health concerns that may impact your finances?
- Do you have plans for protecting your family from an unexpected life event like illness or death?
- How would your finances be impacted by parent or child care requirements?

Finances

- What is your most important question or concern regarding your finances?
- When did you last update your financial plan?
- Do you have savings to cover an emergency or unexpected expense?
- Have you reviewed your insurance needs?
- Do you have a will or estate plan?

Home

- What is the current mortgage outstanding on your home?
- Do you have plans to move or renovate?
- Do you plan on living in your home after you retire?
- Do you plan to continue living in your home if there was a change in health of you or a loved one?

Next steps

Establish a safe place to keep this document, such as a safety deposit box, in case your home is compromised. Keep in mind that this document is only useful if it contains updated information – consider reviewing and updating it annually.

For additional information on how you can work towards helping to secure your financial future, please book an appointment with an investment professional.

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