



## Personal Goal Setting

Chances are, you're working hard to "get ahead"...but where are you headed? What kinds of things would you like to do, have, and accomplish over the next few months or years?

You probably have goals in various areas of your life, such as career, finance, education, or fitness. Some of these may be short-term goals such as getting a promotion at work, buying new clothes, or going on a vacation trip. Others may be long-term goals—whether it's buying a home, starting a business, or paying for college education.

### Goals can guide you financially

Setting financial goals can help guide your approach to saving, investing, and managing your money in general. To determine your financial goals, imagine your future:

- Where do you want to live? In what kind of home? In what sort of neighborhood?
- Will you have children (or more children)? How many?
- What career will you have?
- What will your lifestyle be like—both while you're employed and in retirement?
- In what manner would you like to provide a legacy for the next generation and give back to your community?

### Write down your goals

To reach your goals, it can be very helpful to write them down on paper as opposed to just thinking about them. Writing your goals can help you determine exactly what you want to accomplish, and by when. It'll help you see what's really important to you and where to focus your time and effort. That's why writing down your goals is a great first step for moving your ideas from dreams to reality.

Use the worksheet below to describe your long-term, short-term, and immediate goals in different categories. Over time, as your personal circumstances change, your goals may change as well. Update your goals on a regular basis and during times of major change.

We invite you to contact Wells Fargo for further information and assistance. Visit our Web site at [wellsfargo.com](http://wellsfargo.com) or any Wells Fargo store.

### Personal Goal Setting Worksheet

As you determine your goals, consider what action steps you'll need to take; what obstacles you may face and how you'll address them; what resources you'll need; and who can help you. Update your goals on a regular basis and during times of major change.

Goals	Start Date	Goal Date	Categories						
			Career	Finance	Education	Health & Fitness	Community	Personal Development	Leisure
<b>Immediate</b> (next 6 months–1 year)									
<b>Short-Term</b> (next 1–5 years)									
<b>Long-Term</b> (next 6–10 years+)									