

Compass Financial Counseling LLC

Personal Priority Analysis

Identify with a "1", "2" or "3" your top 3 priorities for the next six (6) months.

- 1. Developing a Spending Plan (Budget) _____
- 2. Personal Debt Elimination _____
- 3. Establishing an Emergency Fund / Opportunity Savings Fund _____
- 4. Estate Planning – Wills & Trusts _____
- 5. Career Planning _____
- 6. Retirement Planning / Financial Independence Planning _____
- 7. Investment Planning _____
- 8. Business Development Planning _____
- 9. Other Goals _____

(Explain)

What issues would you like to discuss during your complimentary 30 min consultation?
