

\_\_\_\_\_  
Date Prepared

\_\_\_\_\_  
Your Name

### Worksheet 3: Financial Outlook

- Do you plan to make a major purchase or an investment of more than \$5,000 in the next two years?  Yes  No
  - If so, give details.  
\_\_\_\_\_
- Are you planning a career change in the next two years?  Yes  No
  - If so, give details.  
\_\_\_\_\_
- Are you planning to retire from your current occupation in the next five years?  
 Yes  No
  - If so, give details.  
\_\_\_\_\_
- Are you planning to enter a college, vocational, or professional school in the next few years?  Yes  No
  - If so, give details.  
\_\_\_\_\_
- Do you expect to receive a significant inheritance or gift in the next few years?  
 Yes  No
  - If so, give details.  
\_\_\_\_\_
- Do you know of any other approaching events that are likely to affect your \_\_\_\_\_