
Date Prepared

Your Name

Worksheet 3: Financial Outlook

1. a. Do you plan to make a major purchase or an investment of more than \$5,000 in the next two years? ☐ Yes ☐ No
b. If so, give details.

2. a. Are you planning a career change in the next two years? ☐ Yes ☐ No
b. If so, give details.

3. a. Are you planning to retire from your current occupation in the next five years?
☐ Yes ☐ No
b. If so, give details.

4. a. Are you planning to enter a college, vocational, or professional school in the next few years? ☐ Yes ☐ No
b. If so, give details.

5. a. Do you expect to receive a significant inheritance or gift in the next few years?
☐ Yes ☐ No
b. If so, give details.

6. a. Do you know of any other approaching events that are likely to affect your financial status? ☐ Yes ☐ No
b. If so, give details.