
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.