

SETTING MY FINANCIAL GOALS

Write down your goals:

- To help you commit to making them happen.
- As a great first step towards creating a successful financial plan.



TIP

**Make your goals
“S.M.A.R.T.”:**

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-bound

My short-term goals - for the next 2 years

My goals	My priorities (high, medium, low)	My goals in specific terms (use S.M.A.R.T.)
<i>Example: Save for a vacation</i>	<i>medium</i>	<i>I want to take a cruise in February next year. I want to start saving \$150 a month to help pay for the cost.</i>

My long-term goals

My goals	My priorities (high, medium, low)	My goals in specific terms (use S.M.A.R.T.)
<i>Example: Save for my child's education</i>	<i>high</i>	<i>In 7 years, my oldest will enter college or university. I want to have \$50 a month transferred from my bank account into an RESP to take advantage of the government grant.</i>

BUILD IT. PROTECT IT. ENJOY IT.

Need help with the next step? Call us at 1 877 SUN-LIFE (1 877 786-5433) or visit www.sunlife.ca/myfinancialplan