

---

# SYCAMORE FINANCIAL

---

WHAT ARE YOUR DREAMS FOR THE FUTURE?



## WHAT IS THIS GUIDE?

At Sycamore Financial we ask the same key questions to each of our clients: What are your goals? What do you want to achieve? What are your dreams for the future?

This worksheet will help you to do exactly that - determine your financial goals and help you identify what you want to achieve, both short term and long term.

Beyond pinpointing these objectives, our hope is to guide you in having the right conversations with your fiduciary. When you know what questions to ask and what information you need to properly answer your financial advisor's questions, you will be advancing towards achieving your financial goals.



## LIST YOUR TOP THREE FINANCIAL GOALS.

If you are with your spouse or partner, do this independently. Also, do this without the help of your fiduciary. It is important to note what is individually important before determining, ultimately, what the most important financial goals are for your family.

These goals are things that are important to you to achieve, whether they be long term or short term goals. Don't worry about how others may perceive these goals. But, put pen to paper and record them.

Goal 1: \_\_\_\_\_  
Goal 2: \_\_\_\_\_  
Goal 3: \_\_\_\_\_

**GO THROUGH THIS LIST OF COMMON FINANCIAL GOALS. PLACE A CHECK MARK BY THOSE THAT ARE IMPORTANT TO YOU, OR THAT LINE UP WITH THE TOP**

**THREE GOALS YOU ALREADY LISTED. CROSS THROUGH ANYTHING THAT IS NOT AT ALL IMPORTANT TO YOU. IF YOU ARE INDIFFERENT ABOUT A GOAL, LEAVE IT AS IS.**

- ☐ To feel more successful
- ☐ To pay for personal self-improvement (e.g., go back to school, learn a skill)
- ☐ To experience the excitement of investing
- ☐ To start a new business
- ☐ To buy a house
- ☐ To save for my child's education
- ☐ To stop working and do something I love
- ☐ To go on a dream vacation
- ☐ To relocate in retirement
- ☐ To care for my aging parents
- ☐ To give to charity or other causes I care about
- ☐ To feel secure about my finances in retirement
- ☐ To feel secure about my finances now
- ☐ To leave an inheritance to my loved ones
- ☐ To retire early
- ☐ To save for future medical expenses
- ☐ To not be a financial burden to my family as I grow older
- ☐ To become debt free
- ☐ To build an emergency fund





After going through this list, did any of your goals change? Did you realize that something is now more important to you? Reorder, if they have changed, or rewrite, if they are the same, your financial goals below.

Goal 1: \_\_\_\_\_  
Goal 2: \_\_\_\_\_  
Goal 3: \_\_\_\_\_

## NOW WE HAVE YOUR GOALS! HOW ARE WE GOING TO MAKE THOSE GOALS BECOME REALITY?

The short answer? It depends! At Sycamore Financial, our services are highly personalized. Depending on your age, goals, and how much risk you are willing to assume, two people can have two very different paths to the same goal. We want to not only help you identify these goals, but also help you develop a step-by-step, year-by-year plan to achieve these goals.



# CALL TO ACTION

It's a great first step that you've started the process of identifying your most important financial goals! But what's next? How do you achieve these goals?

Sycamore Financial takes a comprehensive approach to financial planning and wealth management. We walk with you from your first job, to retirement, and everything in between. We can create a personalized plan for all of life's stages and make your goals a reality.

## **AS A FIDUCIARY, IT IS OUR LEGAL RESPONSIBILITY TO DO WHAT IS IN YOUR BEST INTEREST.**

Our responsibility is to always give recommendations that are in your best interest. This means our advice is based on what's best for you and not for our bottom line. Our purpose is to help you remain financially independent throughout your life. We want you to have the ability to save and accumulate wealth so that you can have the freedom to spend your money how you want.

Our team at Sycamore Financial combines the personalization of a human perspective with the efficiency of technology and we specialize in a variety of services including: Investment Management, Funding & Managing Retirement Income, and Providing for Your Heirs.





# ABOUT SYCAMORE FINANCIAL

We understand that every investor is unique and offer customized services rather than prepackaged financial management plans. We maintain a line of communication to provide each client the service and attention they need. Once we've analyzed your current situation, we work with you to formalize an individualized and personalized solution that will fit your needs. In a constantly changing economy, managing growth requires constant monitoring and adjustment.

Sycamore Financial Advisors is an investment adviser registered with the State of Tennessee and has offered investment advice and planning to individuals, families, businesses, institutions, and trusts since 1993.

---

**CONTACT ONE OF OUR FIDUCIARIES AT  
SYCAMORE FINANCIAL FOR A CONSULTATION.  
WE WILL BE WITH YOU FROM BEGINNING TO END  
IN MAKING YOUR FINANCIAL GOALS BECOME  
REALITY.**

**CLICK HERE TO SCHEDULE A MEETING OR CALL  
US AT 731-784-4444.**

