

# NEXT DECADE PLANNING WORKSHEET

This worksheet is designed to help align your values and aspirations to your financial priorities. At Client First Capital, this can be an important part of the financial analysis process as it will impact cash flow, portfolio liquidity, and distribution strategies.

<b>Name</b>		<b>Date</b>	
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## VALUES

List the values that are meaningful to you.

<p><b>List your top 5 values</b> (use values from the list below, or add your own)</p>	
<p><b>Additional comments</b></p>	

### Sample list of values:

- |             |              |                 |               |                 |
|-------------|--------------|-----------------|---------------|-----------------|
| Achievement | Decisiveness | Friendship      | Money         | Safety          |
| Adventure   | Diversity    | Generosity      | Openness      | Security        |
| Autonomy    | Education    | Growth          | Order         | Self-expression |
| Balance     | Environment  | Happiness       | Peace         | Service         |
| Challenges  | Ethics       | Health          | Philanthropy  | Spirituality    |
| Change      | Excellence   | Helping others  | Play          | Stability       |
| Community   | Excitement   | Honesty         | Pleasure      | Status          |
| Competence  | Fairness     | Independence    | Power         | Teamwork        |
| Competition | Fame         | Integrity       | Privacy       | Tradition       |
| Consensus   | Family       | Leadership      | Recognition   | Variety         |
| Cooperation | Flexibility  | Loyalty         | Relationships | Wealth          |
| Creativity  | Freedom      | Meaningful work | Religion      | Work            |

## BUCKET LIST / ASPIRATIONS

Imagine having a large financial windfall, perhaps through the sale of a business, inheritance, etc. Write down what you would like to do with your time over the next decade in the spaces below.

<b>Purpose-driven work</b>	
<b>Hobbies</b>	
<b>Volunteer work</b>	
<b>Learning</b>	
<b>Travel / relaxation</b>	

## PEOPLE

List the people that you want to spend time with, and any specific events/activities/trips, etc. that you would like to do with them.

Spouse or significant other	
Family	
Friends / social groups	

## HEALTH & WELLNESS

How do you intend to maintain your health? Use the spaces below to list your plans for self-care.

Physically	
Mentally	
Emotionally	

## IMPACT

In the spaces below, describe how you want to make a difference, and note what you would regret if you couldn't do it.

With family	
With friends	
With community or causes	
Other	

## PRIORITIES

Imagine that you only have a few years to live. How does having a time constraint impact your answers from the previous sections?

# FINANCIAL ALIGNMENT

Now, based on your values, aspirations, and intents from the previous pages, let's define some financial priorities to make the next decade the best possible decade for you. Fill in some "NOW" priorities and some "DECADE" priorities to help guide your planning process.

<b>EXAMPLE</b>	Priority:	<i>Develop a family giving plan</i>		
	Timeline:	<i>1-5 years</i>	Cost:	<i>\$10,000</i>
	Next best step:	<i>Identify charities that support causes that the family is passionate about</i>		

## NOW PRIORITIES ▶ SHORT-TERM, 1-3 YEARS

<b>1.</b>	Priority:			
	Timeline:		Cost:	
	Next best step:			

<b>2.</b>	Priority:			
	Timeline:		Cost:	
	Next best step:			

<b>3</b>	Priority:			
	Timeline:		Cost:	
	Next best step:			

**DECADE PRIORITIES ▶ 3-10 YEARS**

<b>1.</b>	Priority:			
	Timeline:		Cost:	
	Next best step:			

<b>2.</b>	Priority:			
	Timeline:		Cost:	
	Next best step:			

<b>3</b>	Priority:			
	Timeline:		Cost:	
	Next best step:			

<b>4</b>	Priority:			
	Timeline:		Cost:	
	Next best step:			

<b>5</b>	Priority:			
	Timeline:		Cost:	
	Next best step:			