

PLANNER

What's Your Goal?

As a Spender,
what can you do to help get there?

As a Saver,
what can you do to help get there?

As an Investor,
what can you do to help get there?

As a Planner, what are you going to do
once you get there?

Message From the Dean



GOALS

Like most men, I am directionally challenged. I have a hard time determining east from west. If I am lost, I won't ask for directions. I really can make traveling more difficult than it has to be. Just ask my wife.

When looking at our financial travels, everybody wants to end up in the perfect place. But wishing it were so and actually making it a reality are two different propositions. Most of us will start out with good intentions, but along the way, things usually take some unexpected turns.

By laying out some basic goals, you create an essential road map for tomorrow. Goals allow you to navigate the detours that will happen. They may be the spur that is needed to make up for lost time. And achieving a hard earned goal is a great feeling.

That is why it is so important to determine your goals, and then have the financial backbone to stick with the plan. Yes, as we go through life our financial situation may change, for better or for worse. But no matter where you find yourself – Spender, Saver, Investor, or Planner – your goals will be the key to moving on. And most importantly, it can make your travels much easier. I'll let my wife know.

U for You.

The Dean