2023 · MASTER LIST OF GOALS

R.W. Rogé & Company
PRIVATE WEALTH MANAGEMENT SINCE 1986

RETIREMENT GOALS	YES	NO
Do you need help deciding when you want to retire?	☐	☐
Do you want to retire early?	☐	☐
Do you want to slow down and work part time (semi-retire)?	☐	☐
Do you want to take sabbaticals during your career?	☐	☐
Do you want to feel confident about your plans for retirement?	☐	☐
Do you want to feel confident about your retirement income sources (e.g., investment accounts, retirement plans, pension plans, Social Security)?	☐	☐
Do you want to feel confident about your current (and future) financial situation?	☐	☐
Do you plan to change your residency in retirement?	☐	☐

FAMILY GOALS	YES	NO
Do you want to have or adopt a child?	☐	☐
Do you want to save for a child or relative's education?	☐	☐
Do you want to save for any family milestones (e.g., bar/bat mitzvahs, graduations, weddings)?	☐	☐
Do you want to support family members who may require special needs planning?	☐	☐
Do you have any parents or other family members you want to care for?	☐	☐
Do you have plans to change your marital status?	☐	☐

SELF-DEVELOPMENT & PROFESSIONAL GOALS	YES	NO
Do you want to achieve financial independence or improve your overall financial health?	☐	☐
Do you want to pursue more education or certifications for personal or professional reasons?	☐	☐
Are you looking for professional advancement (new job, career, promotion)?	☐	☐
Do you want to optimize your employee benefits and compensation package?	☐	☐
Do you want to start your own business?	☐	☐

ASSET & DEBT GOALS	YES	NO
Do you want to reduce the risk of market volatility on your investments?	☐	☐
Do you want to increase the rate of return on your investments?	☐	☐
Do you want to improve your cash flow (increase income or reduce expenses)?	☐	☐
Do you want to increase the amount you keep in your emergency fund?	☐	☐
Do you want to save more for future goals?	☐	☐
Do you want to protect your real and personal property from risk?	☐	☐
Do you want to refinance or pay off any loans (such as mortgages or student loans)?	☐	☐
Do you want to refinance, consolidate, or pay off any debts (such as high-interest credit cards)?	☐	☐
Do you have plans for a second home or vacation/investment/ rental property?	☐	☐

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LIFESTYLE GOALS	YES	NO
Are you planning to move (such as changing your residence) now or in the future?	☐	☐
Are you planning to purchase or sell a home?	☐	☐
Are you planning to purchase or sell a second home?	☐	☐
Do you want to make a significant home improvement or major purchase?	☐	☐
Do you want to buy or lease a vehicle?	☐	☐
Do you want to plan a large vacation now or in the future?	☐	☐

TAX PLANNING GOALS	YES	NO
Do you want to reduce your tax liability now?	☐	☐
Do you want to reduce your tax liability in the future?	☐	☐
Do you want to support a charity?	☐	☐
Are you planning to sell a business, real estate, or another major asset?	☐	☐

HEALTH CARE GOALS	YES	NO
Do you need to plan for a disability?	☐	☐
Do you want to plan for long-term care expenses?	☐	☐
Do you want to plan for future medical expenses?	☐	☐
Do you need to make changes to your health insurance coverage?	☐	☐
Do you want to age in your home and avoid a nursing home?	☐	☐
Do you need to prepare for a possible illness (for either you or your spouse)?	☐	☐

ESTATE PLANNING & WEALTH TRANSFER GOALS	YES	NO
Do you want to provide gifts to your children and loved ones during your lifetime?	☐	☐
Do you want to protect your assets from creditors, bankruptcy, or divorce?	☐	☐
Do you want to feel secure that your appointed fiduciaries will carry out your wishes in the event of your incapacity and/or death?	☐	☐
Do you want to ensure that your spouse or other family members are cared for in the event of your death?	☐	☐
Are there charitable organizations that you want to support?	☐	☐
Do you want to ensure your assets pass to your heirs easily?	☐	☐
Do you want to place some restrictions on the assets your heirs will inherit?	☐	☐

MISCELLANEOUS GOALS	YES	NO
Are there any other goals you want to consider that are not addressed above?	☐	☐

About Us

R.W. Rogé & Company, Inc. is a "Fee-Only" financial planning and wealth management firm serving clients virtually and locally across the country with offices in New York, Massachusetts, and Florida. The company was founded on a “client first” culture and proudly commits to acting in the best interest of its clients as a fiduciary.

With over 35 years of experience, we understand that managing your wealth is like a journey – you start with a plan and are prepared to address any unexpected obstacles along the way. Our mission is to help clients Plan, Achieve and Live® the life they want.

If you would like to learn more about our firm, or wish to arrange a no obligation, complimentary initial meeting, please contact us at 631.218.0077, or via e-mail at info@rwroge.com

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