

# Financial DNA<sup>®</sup>

## Goals Discovery

### Goals-Based Planning Report for Chris Coddington

Your goals, needs, and wants to  
serve as the foundation of the  
financial planning process.

# Short-Term Goals

# Long-Term Goals

Today

August 2024

2024 +

## Top Short-Term Need:



Expand my business operation

## Top Long -Term Need:



Set up my own foundation

### Short-Term Focus



Career & Business (2)



Health (2)



Recreation (2)



Community (2)



Financial (2)



Relationships (1)

### Long-Term Focus



Relationships (2)



Career & Business (1)



Health (1)



Recreation (1)



Financial (1)



Community (1)

Short-Term Needs	Category
1. Expand my business operation	Career/Business
2. Invest in making more connections	Relationships
3. Join a fitness center	Health
4. Have a health check-up	Health
5. Vacation/travel regularly	Recreation
6. Increase my savings	Financial
7. Prepare or update my will	Financial

Long-Term Needs	Category
1. Set up my own foundation	Community

Short-Term Wants	Category
1. Change my current role based on passion	Career/Business
2. Start/pursue a hobby	Recreation
3. Give 10% of income to worthy causes	Community

Long-Term Wants	Category
1. Set up a family business succession plan	Career/Business
2. Provide financial help for my children/grandchildren	Relationships
3. Leave an inheritance for my family	Relationships

Short-Term Wants	Category
4. Join a non-profit board	Community

Long-Term Wants	Category
4. Protect my lifestyle against illness	Health
5. Invest in once in a lifetime experiences	Recreation
6. Have financial freedom in retirement	Financial