

Personal Priorities Worksheet

Priority Today	In Five Years	In Ten Years	Actions to Take
Career / Business			
Education			
Finances			
Community			
Family			
Friends			
Relationship / Partner			
Fun / Recreation			
Health / Fitness			
Self-Development			
Travel			

Filling out this worksheet is an exercise that would be helpful to do once a year, to see if and how your priorities have changed. These priorities will in turn affect your finances and your financial planning.

Worksheet 13.1