

# Waddell Coaching Services

## Personal Priority Analysis

Identify with a "1", "2" or "3" your top 3 priorities for the next six (6) months.

1. Developing a Spending Plan (Budget) \_\_\_\_\_
2. Personal Debt Elimination \_\_\_\_\_
3. Establishing an Emergency Fund / Opportunity Savings Fund \_\_\_\_\_
4. Estate Planning – Wills & Trusts \_\_\_\_\_
5. Career Planning \_\_\_\_\_
6. Retirement Planning / Financial Independence Planning \_\_\_\_\_
7. Investment Planning \_\_\_\_\_
8. Business Development Planning \_\_\_\_\_
9. Other Goals \_\_\_\_\_

(Explain) \_\_\_\_\_

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What issues would you like to discuss during your complimentary 30 min consultation?

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*"Don't become so well adjusted to the culture that you fit in without even thinking."*

*Romans 12:2*