

How a Master List of Investment Goals May Help You Set Better Goals & Make Smarter Financial Choices

Your Money Matter video resource
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Table 1: Master List of Investment Goals	
1	To be better off than my peers
2	To pay for personal self-improvement (e.g., go back to school, learn a skill)
3	To experience the excitement of investing
4	To start a new business
5	To buy a house
6	To help pay for my kids’ college education
7	To stop working and do something I love
8	To go on a dream vacation
9	To relocate in retirement
10	To care for my aging parents
11	To give to charity or other causes I care about
12	To feel secure about my finances in retirement
13	To feel secure about my finances now
14	To leave an inheritance to my loved ones
15	To retire early
16	To pay for future medical expenses
17	To not be a financial burden to my family as I grow older

Table source: https://www.financialplanningassociation.org/sites/default/files/2020-07/Sin_Murphy_Lamas_July2019.pdf