



# What can your money do for you?

## Setting financial goals for now and later

When you think about it, your financial goals are likely to fall into one of these four categories: Purchasing things, growing in value, supporting your lifestyle, or securing the future for you and your loved ones. Below, identify one short-term goal and one long-term goal you'd like to achieve for each bucket.

### SHORT-TERM GOALS

### LONG-TERM GOALS



#### PURCHASE

Something you want to purchase within a year  
( $< \$2,500$ )

Something you want to purchase in over a year  
( $> \$2,500$ )



#### GROW

One reason to invest for the near future  
( $< 5$  years)

One reason to invest for the distant future  
( $> 5$  years)



#### SUPPORT

Something that could improve  
your lifestyle right now

Something that could improve  
the lifestyle of a loved one later



#### SECURE

Something that would make you feel  
secure in your working years

Something that would make you feel  
secure in your retirement years



**Financial wellbeing starts with knowledge you can trust.  
For more than 170 years, we've been guided by a single purpose:  
to help people secure their future and protect the ones they love.**

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