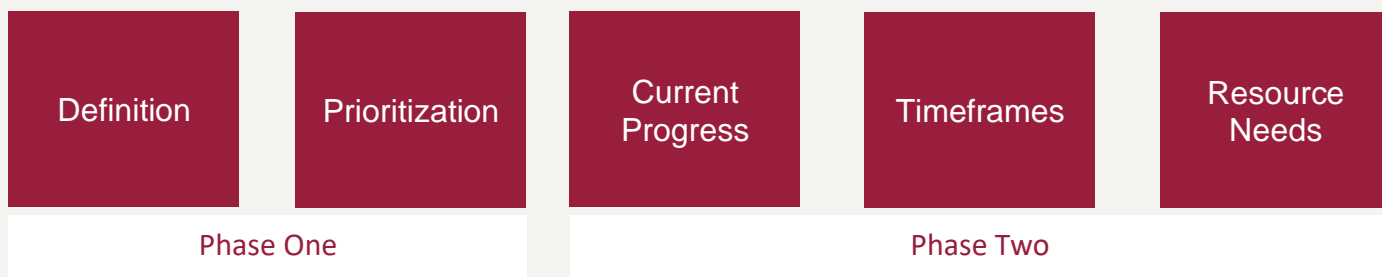


Goal Identification Form

Welcome to the Pegasus family! We look forward to working with you to achieve your financial goals. This form is the first step of the goal identification process.

Goal Identification Process

Our process is based on you; your goals help us know what is important to you so that we can help you to achieve those goals. Welcome to Phase One!



Family Goals

	Priority Level			
	N/A	Low	Medium	High
Buy/Sell a home				
Get engaged or married				
Family vacation/reunion				
Manage debt				
Create an estate plan				
Have a kid/Expand the family				
College funding/planning				
Get divorced				
Financial freedom				
Retirement preparation				
Understand cash flow				
Other _____				

Professional/Business Goals

	Priority Level			
	N/A	Low	Medium	High
Change job/career				
Get an advanced degree/accreditation				
Start/Sell a business				
Partnership changes/Succession planning				
Business expansion				
Employee benefits changes				
Key employee planning				
Other _____				

Goal Prioritization

Top 5 Priorities from Above:	Progress Started		Target Completion Date
	Yes	No	
1.			
2.			
3.			
4.			
5.			

Resource Identification

Achieving your goals often requires the help of professionals. To help you coordinate your goals and the professionals guiding your journey, who are the following professionals that you're working with...

	Name	Phone	Email
Realtor			
Estate Attorney			
Accountant			
Travel Agent			
Insurance Agent			
Bus. Attorney			
Mortg. Banker			
Debt Counselor			
Divorce Attorney			

Those Like You...

Our goals impact us, our families, our friends, and those around us. For many of us those in our lives have similar goals and are going through many of the same stages of life. This section is about helping those in your life to achieve their goals. Who do you know looking to...

Buy/Sell a home	Getting married/Getting divorced
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Having a baby/Looking to adopt	Changing jobs/Recently changed jobs
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Starting a business	Partnership changes/Succession Plan
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Dealing with a death in the family	Looking to retire
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

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