

# **Ready, Set, GOAL!**

**A Quickstart Guide to Setting  
Retirement Financial Goals**



**IF YOU DON'T  
KNOW HOW  
CLOSE OR  
FAR AWAY  
YOU ARE TO  
REACHING  
YOUR  
FINANCIAL  
GOALS,  
HOW WILL  
YOU EVER  
GET THERE?**

Setting goals for your future is a tough task. There are many circumstances you can't predict, which may make the planning process a bit overwhelming. But there is something about the future that you can control – setting goals to secure your financial future after retirement.

Creating realistic goals is the first step to setting sail on a set financial plan that will define your future. The good news is that you're not alone on this journey. We're here to work with you to define and document your goals.

Here are a few simple steps to get you started:



# 1 STEP

## Determine Your Priorities

Where do you see yourself in a few years? Once you've retired, what kind of lifestyle do you want to secure for you and your loved ones?

Think honestly about these questions. Take time to really consider them, discuss goals with your family, and write them down. Analyze and rank which goals are your highest priorities.

Once you fully understand what you want to achieve, map out how you'll get there. Be specific about each of these steps and record them in a place where you'll be reminded of them every day. Use these daily reminders as a basis for your goals.



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# STEP 2

## Be Realistic

Nothing hinders your goals (or confidence) more than unrealistic expectations. Putting your goals into perspective from the start will increase your opportunity to achieve your goals and decrease wasted efforts put into unattainable goals.

Start by setting specific timeframes for accomplishing each of your goals. Then, honestly ask yourself, “Can I actually accomplish this, or do I need to rethink things?”



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# STEP 3

## Track Your Progress

You'll never know where you're going if you don't know where you are or how you got there. Tracking your financial progress will keep you on track, alert you when you need to make changes, and ultimately reach those final goals.

Use the "Goals" tab on your personal financial management site to stay focused on your financial goals. You can add your goals, assign accounts to fund those goals, and monitor your progress toward reaching them.



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# 4 STEP

## Make Data-Based Adjustments

The road to your financial goals is rarely perfectly straight. You'll likely hit some bumps along the way and will need to make detours to reach the retirement you've envisioned.

But that's why we're here.

We'll work with you to model what-if scenarios and give you visibility into how small changes—such as delaying retirement or refinancing your home—can affect your goals. Our team of experts will then guide you in making those adjustments to ensure you're back on track to your version of success.



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# 5 STEP

## Ask for Help

When in doubt, always ask for help. Every question you have regarding your financial future is reasonable and should be directed towards an expert.

When the unexpected occurs or you have a question, entrust your and your family's financial future with our team of caring experts. They'll review your financial goals, gain in-depth knowledge about your unique situation, and provide the insight you need to make informed, financially sound decisions.



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# STEP 6

## Stick with It

Hitting your retirement goals is a journey. Short sprints simply won't help you accomplish those bigger, life-changing goals.

Follow your financial plan. Use it as a roadmap to steadily follow the path to the financial future you envision for yourself and your family. As you hit those roadblocks or in moments when you feel defeated, we'll be here for you. Our team will work together to document your plan, refine it as needed, and help you stick to the plan as well as tax filing dates.



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## Final Thoughts

Learn more about how to accurately understand your net worth and how it can improve your financial health. Our ensemble of financial advisors can help – whether you are a business owner, retiree, or planning for retirement.



[www.evergreenwealthsolutions.com](http://www.evergreenwealthsolutions.com)

[info@egwealth.com](mailto:info@egwealth.com)

1000 Commerce Park Drive, Suite 407  
Williamsport, PA 17701

Phone: 570.601.6960 | Fax: 570.651.9032

Scan on your phone to  
browse our website:

