

*Video 2 - Goals & Myths*

# YOUR WEALTH MASTER PLAN



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## VIDEO 2: GOALS & MYTHS

### GOALS:

1. What age do you want to retire? \_\_\_\_\_

2. What do you see yourself doing in retirement?

*(Travel, time w/ family, working part time, running a passion business, etc)*

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3. What income do you see yourself living off of in retirement?

*(If you don't know, write down what kind of lifestyle you want:  
minimalist, modest, luxury)*

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## VIDEO 2: GOALS & MYTHS

### GOALS con't:

What wealth building strategies interest you most?

(check next to your choices)

- ☐ Passive investing in the stock market (funds)
  - ☐ Active investing (stock picking)
  - ☐ Real estate investing
  - ☐ Building a business
  - ☐ Alternative investments (startups, cryptocurrencies, gold, etc.)
  - ☐ List anything else that interests you: \_\_\_\_\_
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## VIDEO 2: GOALS & MYTHS

### MYTHS/MISCONCEPTIONS:

What myths/misconceptions discussed have been stopping you from reaching your financial goals?

(check next to your choices)

- ☐ You thought you earned too little to need a wealth master plan
- ☐ You thought you didn't have enough money to invest
- ☐ You thought it was too late to plan
- ☐ You thought your work retirement was all you could do
- ☐ You thought it was all too complicated to learn
- ☐ You don't have time
- ☐ Other (list out):