



## INDIVIDUAL GOAL SETTING WORKSHEET

*Setting goals for care of family and distribution of funds is important. Use this chart to list your goals, and indicate the dollar figure required to fund those goals.*

Priority	Goal	\$\$ Required
	Provide for personal lifestyle.	\$
	Provide for family care and lifestyle.	\$
	Provide for assets for children. Note: determine if that gift should be outright or in trust.	\$
	Provide for assets for grandchildren.	\$
	Provide for elderly parents or family.	\$
	Provide for family members with disabilities or other special medical needs.	\$
	Provide for charities supported during life.	\$
	Provide for the U. S. Government's programs and activities through a gift to the Internal Revenue Service	\$
	Other:	\$
		\$
		\$
		\$
	<b>TOTAL</b>	\$

*The ADA Foundation provides this information for the benefit of potential donors.  
It is not intended as legal or other professional advice.  
Individuals should always consult their own professional counselors for such advice.*