

YOUR FINANCIAL HOUSE

FINANCIAL GOAL PLANNING

ASSETS

LIABILITIES

Assets - Liabilities = Net Worth

Property
First Home Savings Account (FHSA)
Non-registered Investments
RRSPs / TFSAs / RESPs
Pension

Mortgage
Personal Loan
Credit Cards
Line of Credit

ESTATE PLANNING

Power of Attorney
Will
Health Care Directives

PROTECTION PLANNING

Debt Coverage
Personal Belongings
Loan/Mortgage Payment Protection

EMERGENCY FUND

Savings Accounts
Liquid Assets

Synergy
CREDIT UNION

YOUR FINANCIAL GOALS



NAME _____

DATE _____

Did you know you can manage
your goals on your digital banking?
Sign in and add yours today
by going to **Money Manager**
and clicking on **Goals**.

TOP 3 - 5 GOALS OVER THE NEXT 12 MONTHS

GOAL	PRIORITY	BUDGET	CHECK-IN
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

APPOINTMENT

DATE	TIME	SYNERGY EXPERT	TOPIC
_____	_____	_____	_____
_____	_____	_____	_____

Synergy
CREDIT UNION