

Chapter 2, Exercise #2: Graphic Organizers

Select your preferred graphic organizer—*Four Quadrants Chart* or *Financial Priorities Timeline*—in order to pinpoint your goals. Then, prioritize them, specify your timelines for completion and inventory the financial resources you have available to fund your aspirations. Remember to keep your inventory of financial resources current with respect to your income sources and investments, especially if there are material changes in your financial situation.

Make every effort to confine your visual to one piece of paper. Feel the power of this succinct representation of your plan. Now you are ready to proceed to implement and are prepared to fine-tune as needed over time.

Four Quadrants Chart

PINPOINT GOALS:	PRIORITIZE GOALS with Timelines:
IDENTIFY FUNDING RESOURCES: Income Sources Portfolio Distributions	PROCEED to IMPLEMENT: Steps to Achieve Goals
NOTES:	

Personal Finances of _____

Figure: Four Quadrants Chart

Proceed to Retirement: Financial Priorities Timeline

Financial Priorities



2016	2017	2018	2019	2020	2021
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Year Fulfilled

Funding Sources:

Income and/or account distributions

Financial accounts

Figure: Financial Priorities Timeline