



Your Financial Tool Kit

Developed by the Financial Consumer Agency of Canada, the Investor Education Fund and l'Autorité des marchés financiers



My investing goals

	Short-term goals: Within the next year, I want to:	Amount needed
<input type="checkbox"/>	have enough money coming in to pay for my basic needs and a little left over for fun	<input type="text"/>
<input type="checkbox"/>	put some money away for emergencies or in case I lose my job	<input type="text"/>
<input type="checkbox"/>	take a vacation	<input type="text"/>
<input type="checkbox"/>	pay off all of my credit cards	<input type="text"/>
<input type="checkbox"/>	get married	<input type="text"/>
<input type="checkbox"/>	enjoy a new hobby or get more education	<input type="text"/>
<input type="checkbox"/>	buy things for myself or my family (such as a new appliance, furniture, TV, clothing)	<input type="text"/>
<input type="checkbox"/>	give some money to charity	<input type="text"/>
<input type="checkbox"/>	help out my family members	<input type="text"/>
<input type="checkbox"/>	pay less money in taxes	<input type="text"/>
<input type="checkbox"/>	other:	<input type="text"/>

My investing goals

	Mid-term goals: In the next one to three years, I want to:	Amount needed
<input type="checkbox"/>	save for a new car or boat	
<input type="checkbox"/>	buy a home	
<input type="checkbox"/>	start a family	
<input type="checkbox"/>	fix up my home	
<input type="checkbox"/>	move to a new city	
<input type="checkbox"/>	change jobs	
<input type="checkbox"/>	other:	

My investing goals

	Long-term goals: In the next three years or more, I want to:	Amount needed
<input type="checkbox"/>	pay off student loans	
<input type="checkbox"/>	start my own business	
<input type="checkbox"/>	pay for my kids' education	
<input type="checkbox"/>	pay off my mortgage	
<input type="checkbox"/>	save enough money to work or play when I want to	
<input type="checkbox"/>	build my savings so I'll have steady income when I retire	
<input type="checkbox"/>	leave some money or property to family members	
<input type="checkbox"/>	other:	