

Intermediate-Term Goal Setting Example

Intermediate-Term Goal example: Work with an attorney to complete a will.

*Is your goal SMART? Is it specific, measurable, mutual, attainable, realistic, and relevant?
Do you have the resources to achieve it and have you set a timeline?*

Tasks	Priority (top task is # 1)	Approximate cost (if any) or resources needed	Target start date	Target completion date
Short-term (less than 3 months)				
Complete <i>Record of Important Papers</i> worksheet from <i>Organize</i> module of <i>Legally Secure Your Financial Future (LSYFF)</i>	1	Time <i>Record of Important Papers</i> worksheet	2/3	2/7
Complete <i>Household Inventory</i> worksheet from <i>Organize</i> module of <i>LSYFF</i>	2	Time Camera or videocamera <i>Household Inventory</i> worksheet	2/8	2/15
Read <i>How to Select and Work with an Attorney</i> fact sheet from <i>Prepare</i> module of <i>LSYFF</i>	3	Time <i>How to Select and Work with an Attorney</i> fact sheet	2/17	2/17
Ask a financial professional, trusted friend, or state bar association for names of attorneys who prepare wills	4	Time	2/20	2/25
Interview two or three attorneys; investigate their fees, method of working, time required, and personality	5	Time	4/1	4/15
Intermediate-term (3 to 6 months)				
Select an attorney to prepare will; schedule an appointment	6	Time	5/15	5/29
Complete paperwork requested by attorney	7	Time Forms provided by attorney	6/1	6/20
Review first draft of will completed by attorney; return draft to attorney	8	Time Draft of will	7/20	7/25

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Intermediate-term (3 to 6 months) – continued				
Review final draft of will completed by attorney; OK or request changes	9	Time	8/10	8/12
Determine location for original copy of will; make at least one copy; store both	10	Time Will Photocopy of will	8/20	8/21
Inform loved ones of location of original will and copy(ies)	11	Time Personal contacts	8/21	8/30
Long-term (a year or more)				

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