

Financial Goal Setting Worksheet

Goal	Achievement Date	Cost in Today's Dollars	Current Savings	Amount to Go
Short Term Goals (Under 2 Years)				
Medium Term Goals (2-5 Years)				
Long Term Goals (5+ Years)				

The information you provide in this worksheet will be used to review your current financial situation. The more complete and detailed the information you provide, the more valuable the review will be. The questionnaire requests information that we have found to be common to many of our clients, recognizing that all categories do not apply to all clients. The information supplied in response to this questionnaire is protected, privileged, and will be held in the strictest confidence. It will be used only in the formulation of recommendations of investment strategies to address your circumstances. It will not be revealed to anyone outside of the firm. Oppenheimer & Co. Inc. does not give legal or tax advice. However, our Financial Professional will work with clients, their attorneys and tax professionals to ensure all of their needs are met and properly executed.

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