

# CHECKLIST OF PERSONAL AND FAMILY OBJECTIVES

Prepared by Radden Education Institute

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## ❖ Family

- Meetings and Gatherings
- Visions and Goals
- Roles and Responsibilities

## ❖ Education

- Spouse/Partner (A)
- Spouse/Partner (B)
- Children
- Reading
- Tapes, and Video Learning

## ❖ Health

- Anti-Stress and Relaxation
- Exercise and Athletics
- Food and Drink

## ❖ Legal

- Estate Planning
- Health Care Directives
- Funeral and Burial
- Beneficiaries
- Power of Attorney
- Revise Trust
- Title of Assets

## ❖ Dignity

- Morality / Ethics
- Spiritual Growth
- Reputation
- Promoting and Self Imaging

## ❖ Work / Career

- Buy Out Plan
- Retirement Plan
- Working Capital / Credit Lines

- Family Activities

- Hobbies (Drop or Add)

## ❖ Household

- Home Repairs
- Home Upgrades
- Motor Vehicles

## ❖ Sociability

- Friendships
- Memberships
- Culture

## ❖ Finances

- Savings
- Investments
- Accumulations and Loans
- Accounting
- Taxes
- Successor
- Estate Distribution
- Advisors
- Things to Buy
- Things to Sell
- Net Worth (Top out)
- Percentage Growth of Assets

## ❖ Emergency

- Family Plan (Where To Meet)
- Death
- Disability
- Food Storage

## ❖ Recreation

- Vacations and Excursions