



Goals questionnaire

What do we need to draw out a budget? Grab a coffee, sit down, take a deeeeeep breath and think about the below questions -

What are your long term goals? Not career goals but otherwise. Have you thought about it?

Do you want to retire in sunny Goa without a care in the world owning a small shack and drinking beer all day? Do you want to own an island, a yacht and a private plane (a little much but ok)? What do you want? Put down whatever it is, however frivolous it is. It doesn't matter, these are your goals and no one else's. Try to paint a clear picture.

Example - I'm 50 and I'm living in Goa with my partner. I don't have any debt or responsibilities. My children are doing well for themselves. I have a beautiful little shack and a garden, and I'm living off my savings for the foreseeable future. Now and then I freelance as an artist if I'm in need of cash.

[Put your answer here - feel free to express yourself through long sentences or paragraphs or bullet points, your choice. Point is to think about the above question and start from there]

What are the possible large expenses coming my way this year? -

This is important. Are you planning to get a higher education this year? Do you want to save for a down-payment for a house? a car? Funding a wedding perhaps? planning a vacation, are we? Maybe a new phone? It's best to plan for it instead of living on the credit card or *'going with the flow'*.

[This could be things like Buying a car, marriage expenses etc.]

What are the recurring expenses I have every month?

Use buckets here. For example, my buckets are Rent/ Groceries + Bills/ Miscellaneous (Misc - this could be like a Netflix subscription or eating out). Any Debt that needs to be planned for? - Includes any loan of any sort including an EMI to a credit card.

What?	How Much?

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