



THE MANNING COMPANIES

Manning Wealth Management

ROLE/GOAL DEFINITION: "BEGIN WITH THE END IN MIND"

Critical self-assessment is a key to living a happy and successful life. When thinking about your actions today, it is often useful to consider your destination tomorrow. We recommend that you fill out the following worksheet to articulate those goals.

Personal/Self

Goals/Accomplishments:

Co-Client Relationship

Goals/Accomplishments:

As Parents to Your Children

Goals/Accomplishments:



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Role/Goal Definition continued

As an Adult Child to Your Parents

Goals/Accomplishments:

Professional

Goals/Accomplishments:

Social/Philanthropy

Goals/Accomplishments:

Other

Goals/Accomplishments:
