

# Greenfield Financial User Guide

## Goal Planning

Goals and objectives are the building blocks to any sound financial plan. They help you determine your investment time frame, the amount that needs to be saved and a strategy for selecting the appropriate investments. Goals should be clearly defined and measurable so that progress can be easily monitored. Be sure to write your goals down and keep them handy so that you can refer to them periodically to ensure you are on the right track. On an annual basis you should re-visit to your goals to assess your progress and make any amendments to your strategy. Here are the basic steps for setting goals around major life events.

