



## Plan a roadmap to your future

### STEP 1: Where do you want to go?

- A. **My goal:** \_\_\_\_\_  
(Example: Take an around-the-world trip)
- B. **When do I want this to happen?** \_\_\_\_\_ years \_\_\_\_\_ months  
(Example: In 2 years)
- C. **How much do I think it will cost?** \$ \_\_\_\_\_  
(Example: \$10,000, variable budget)
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### STEP 2: What will that look like?

What will I need to have in place in order to achieve this goal?

- A. **My finances:** \_\_\_\_\_  
(Example: I need to have saved \$10,000 and have all my credit cards paid off and set up a line of credit for emergency funds.)
- B. **My work:** \_\_\_\_\_  
(Example: I need to arrange for a leave of absence closer to the time.)
- C. **My family:** \_\_\_\_\_  
(Example: My spouse will also need to prepare for the trip.)
- D. **Other:** \_\_\_\_\_  
(Example: I need to plan out the itinerary and create a comprehensive “to-do” list)
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### STEP 3: How will you get there?

Using Your Savings Tool, I can see that I will need to save \$ \_\_\_\_\_ a month in order to achieve this goal. You may need to adjust your responses, like saving over a longer timeframe, in Step 1 depending on the results of Your Savings Tool exercise.

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### STEP 4: What do you need to do now, to make it happen?

- A. For **my finances**, I need to take the first steps: \_\_\_\_\_  
(Example: I need to open a TFSA (Tax-Free Savings Account) with a safe investment like a GIC because I’ll need to access the funds in less than two years. I also need to set up a Pre-authorized Transfer Service. I need to boost my credit card payments to get the balance paid down.)
- B. **My work:** \_\_\_\_\_  
(Example: No action needed yet.)
- C. **My family:** \_\_\_\_\_  
(Example: I need to see if my spouse can take time off work too.)
- D. **Other:** \_\_\_\_\_  
(Example: I need to start doing research on my destination, and reassess the plan in six months.)
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