

Intel Financial Goal Worksheet

The seven step process:

1. What do you want?
2. Write it down
3. Set a deadline
4. Make a list of what you need to do
5. Make a plan
6. Take action now
7. Do something each day

Your Goal	Deadline	The Steps	The Plan	First Action
Planning Goals				
Determine how much money you need to retire				
Create or update your will and estate plan Determine your Social Security claiming strategy				
Investing Goals				
Write down your target investment allocation				
Review your Intel retirement account investment for lower cost options Set a strategy for Stock, Options and RSUs Intel UBS account				
Reporting Goals				
Setup a system to track and monitor expenses				
Set a plan to periodically review investments for rebalancing Track investment performance across all accounts				

This tool is for informational purposes only and is intended to help you in making decisions pertaining to your financial future, based on information that you have provided and reviewed. This tool is not intended to provide specific financial, investment, tax or legal advice.



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