

Purpose and goals

Start a plan that describes the life your resources should serve.

Build on earlier weeks: Keep this purpose page at the front. Revisit it whenever a later choice seems to conflict with what matters.

My purpose

What do I want my resources to help make possible?

My goals

Name up to three goals and a rough time frame. Mark what needs discussion.

Facts and assumptions

What do I know? What am I assuming? How will I verify one assumption?

My first question

What would I like to ask a qualified advisor in a voluntary private review?

Keep private: Use categories or initials. No account numbers, passwords, health details or other people's private information. This paper is yours; do not upload it to the site.

Draft goals and questions are not a personal recommendation.

Reading pool: Retirement X-Ray printed 8–13; 81–85; Steward's Code Ch.1 pp.1–6; Ch.8 pp.48–49 — printed pages in retrieved pre-editor manuscript; instructor review required. Source map and review gates accompany the curriculum.