



MY GOALS

What goals are you working toward right now? Whether they're short-term goals like paying off credit card debt, or longer-term goals like saving for retirement or a child's education, you can use this sheet to start mapping them out. Once you're done, bring it with you to your meeting with a Fidelity representative. The meeting might be in person or over the phone. Either way, it will be a good starting point to help you put your goals into action.



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