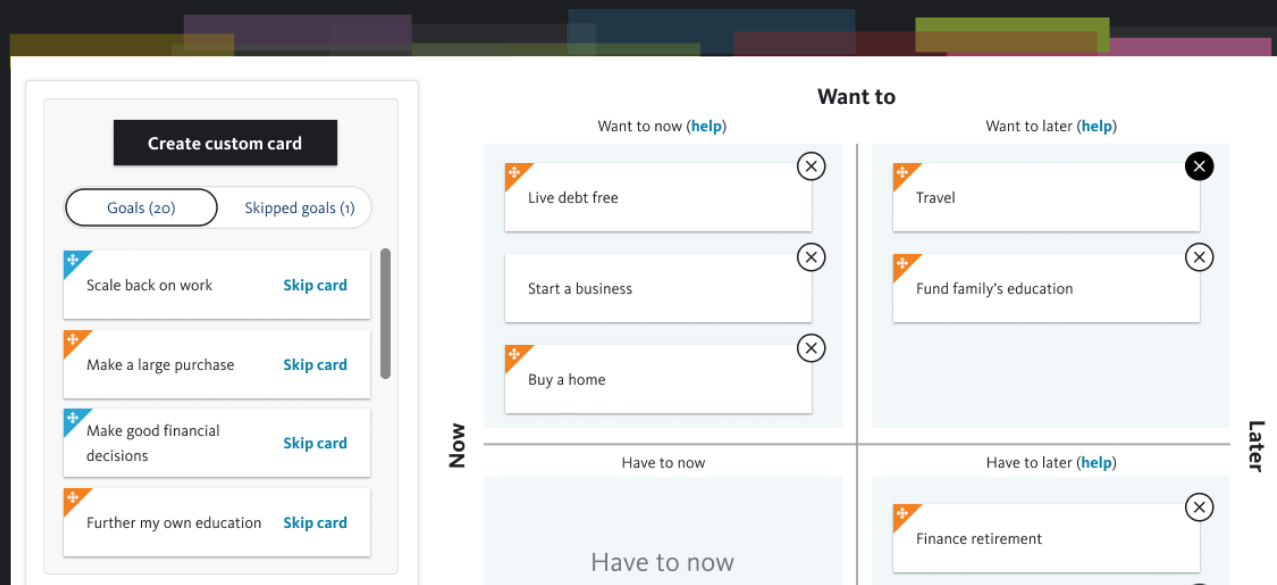




INSTRUCTIONS

Goals-based discovery board



Ready, set, goal!

If talking about financial goals often includes broad terms such as “save enough for retirement,” perhaps it's time to delve deeper. The Discovery Board will help you uncover more specifics about your goals—and then truly prioritize them.



Do you tend to think in broad terms, such as “save enough for retirement?”

Collaboration = better outcomes



Investor(s)



Advisor

This is an exercise to get to know you—things might be possible that you didn't even imagine.

- Openness
- Honesty
- Hopes and dreams
- Individual specific goals without influence from others (even your partner at the session)
- No limits
- “If money weren't an issue”

The advisor's role is to uncover the details, like a child asking “why” over and over. The ultimate goal is to gain consensus on each goal and build a plan to help accomplish the goals.

- Trust
- Expertise
- Listening skills
- Facilitate (don't take part)
- Connect goals to outcomes
- Comfort and security
- Encourage deeper thought (not just college, but what type, and possible scholarships)



Step 1

Review each goal, its importance and where it belongs on the discovery board.

Want to now
Things that are important but not essential in the next 5 years.

Want to later
Things you want but are willing to wait for.

Have to now
Goals that need to be reached in the next 5 years.

Have to later
Long-term goals that can wait longer than 5 years.

Want to
Want to now ([help](#)) | Want to later ([help](#))

Now | **Later**

Have to
Have to now | Have to later ([help](#))

Custom Card Sidebar:
Create custom card
Goals (20) | Skipped goals (1)
Scale back on work. Skip card
Make a large purchase. Skip card
Make good financial decisions. Skip card
Further my own education. Skip card
We can estimate the cost of this goal. (orange icon)
We can't put a price tag on this goal. (blue icon)
Save board or Reset board.
Print board

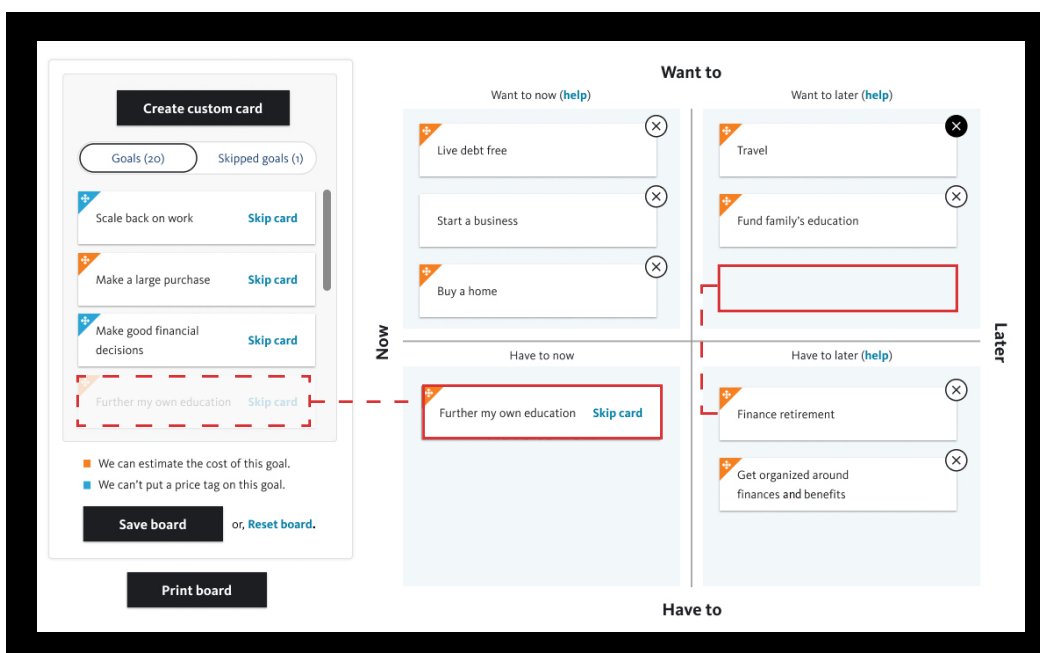
If you can't decide or agree with your partner on the importance of a goal, just skip it and come back later!

The goal cards reflect the most common life and financial goals. Custom cards can be used to record goals that are unique to you.



Step 2

Once the cards have been placed, review each one together with your advisor. They can help facilitate a conversation to dig deeper.



Interactions should include:

Probing questions to gather further details about each individual goal.

Prioritizing the goals within each quadrant.

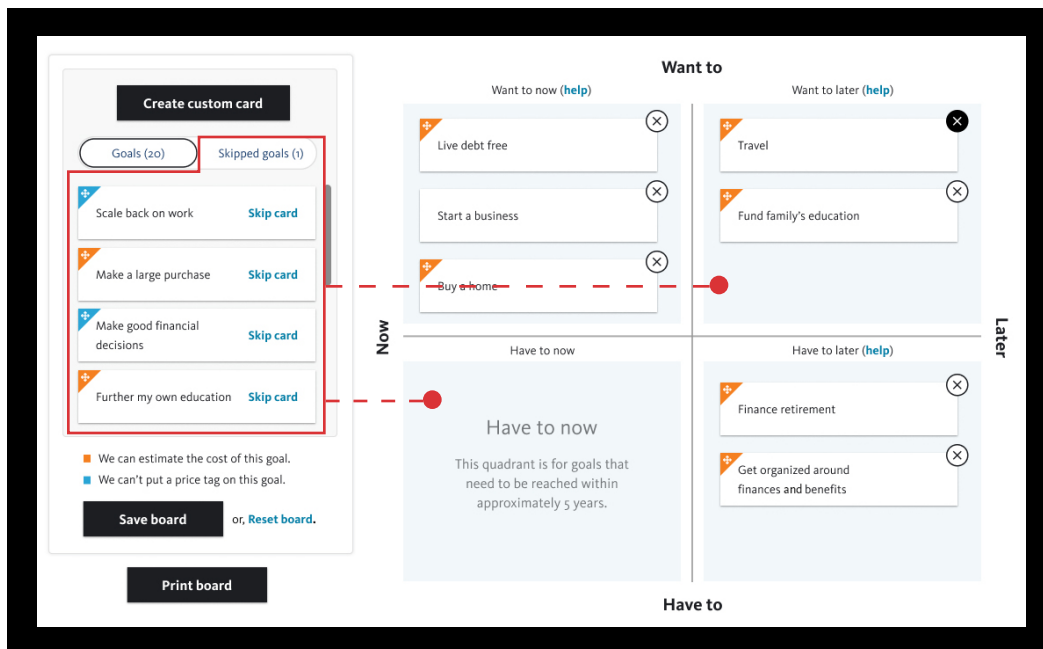
Determining whether there are any trade-offs that need to be made.

Inquiring whether there are any cards to move, now that the “big picture” is laid out.



Step 3

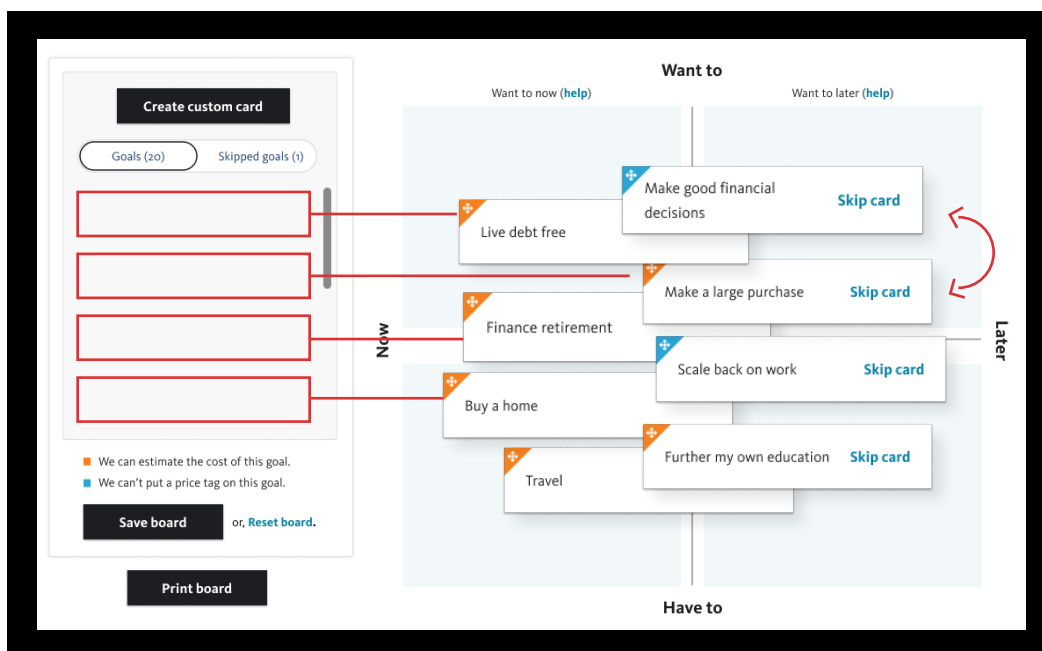
Now, it's time to review skipped cards from Step 1 and place them on the discovery board. Not all cards have to be used. It's fine to skip goals that aren't relevant to you.





Step 4

Together with your advisor's help, complete the following:

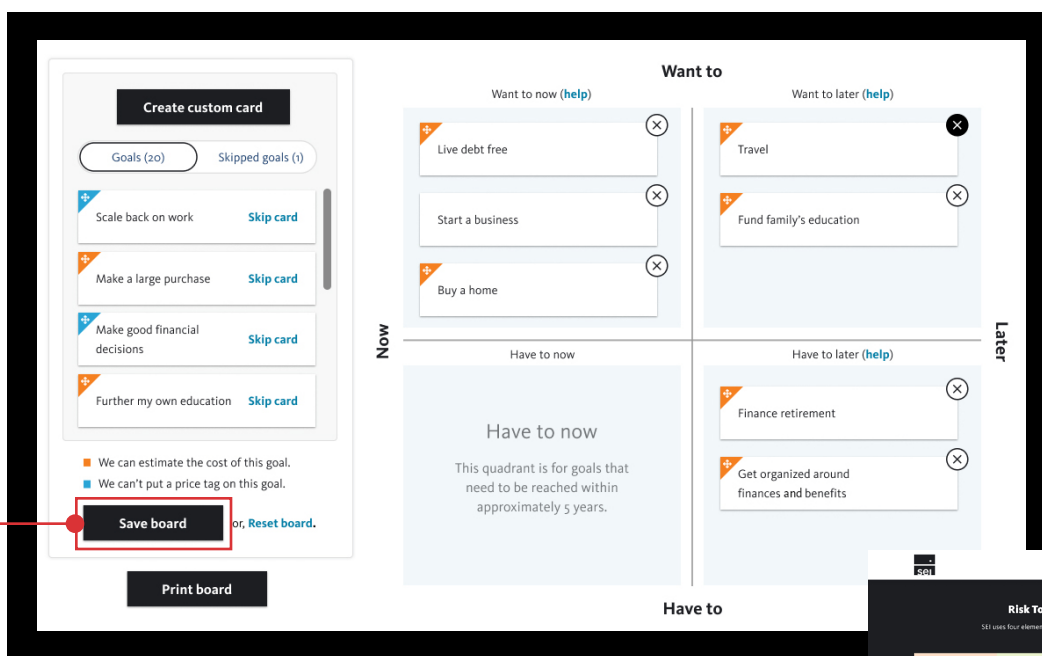


Consolidate goals into common themes, i.e., college education may take precedence over retirement savings.

Confirm any overarching principals that have appeared, i.e., a couple may determine that their needs come before their children's or parent's needs.

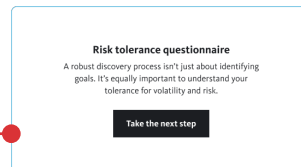


Next steps

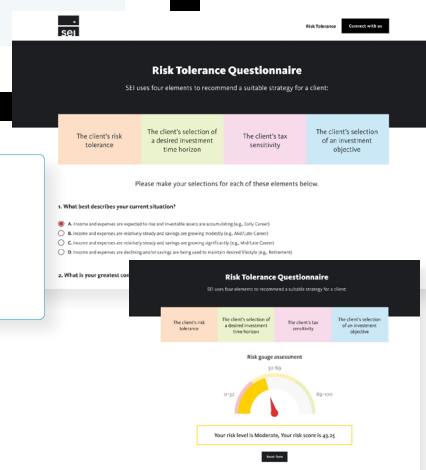


Save your board and email it to your advisor.

Complete the risk tolerance questionnaire.



Ask your advisor to schedule a follow-up call. It will be important to align your resources with your goals. Your advisor can help make a recommendation regarding the associated strategies.



The SEI Discovery Board and Risk Tolerance Questionnaire are the business names for the Goals Based Discovery interactive tools provided by SEI Investments Management Corporation (SIMC), a registered investment advisor. Usage of these tools is for illustrative purposes only and does not constitute advice or a recommendation. SIMC is a wholly owned subsidiary of SEI Investments Company.

If Risk Tolerance is required by SEI, we have incorporated the Risk Tolerance Questionnaire within the Account Application. This tool will not be accepted in lieu of the required Risk Tolerance Questionnaire contained within the Account Application.

Investing involves risk including possible loss of principal. There can be no guarantee objectives will be achieved.

Due to the ever changing nature of investing, be sure to review your investment decisions periodically to be sure they are still consistent with your goals.

Your financial advisor is not affiliated with SEI or its subsidiaries.