

Goal Setting Worksheet #2

Name _____

Date _____

Blending Goals

II. Mutual Goals

Directions: In a team effort, take a look at worksheet #1 together. From that list of goals, the retiring family and the succession family should independently discuss the priority goals and write the goals that you, as a transfer team, view as high priority in each category. Each of the families should have their own Worksheet # 2 completed.

Your High Priority Long-Term Individual Goals	Your High Priority Long-Term Family Goals	Your High Priority Long-Term Business/Career or Retirement Goals
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