

FINANCIAL Goals



TODAY'S DATE:

"A goal without a plan
is just a wish."



WORKSHEET

♥ Dream it. Plan it. Save it. Achieve it. ♥



SHORT-TERM GOALS (0 – 12 MONTHS)

GOAL	GOAL AMOUNT	CURRENT SAVINGS	AMOUNT REMAINING	TARGET DATE	MONTHLY SAVINGS NEEDED
1.	\$	\$	\$		\$
2.	\$	\$	\$		\$
3.	\$	\$	\$		\$



MEDIUM-TERM GOALS (1 – 5 YEARS)

GOAL	GOAL AMOUNT	CURRENT SAVINGS	AMOUNT REMAINING	TARGET DATE	MONTHLY SAVINGS NEEDED
1.	\$	\$	\$		\$
2.	\$	\$	\$		\$
3.	\$	\$	\$		\$



LONG-TERM GOALS (5+ YEARS)

GOAL	GOAL AMOUNT	CURRENT SAVINGS	AMOUNT REMAINING	TARGET DATE	MONTHLY SAVINGS NEEDED
1.	\$	\$	\$		\$
2.	\$	\$	\$		\$
3.	\$	\$	\$		\$



ACTION STEPS

What steps will I take to achieve my goals?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____



POTENTIAL OBSTACLES

What challenges might I face?

1. _____
2. _____
3. _____
4. _____
5. _____



MY MOTIVATION

Why are these goals important to me?



PROGRESS TRACKER

GOAL	J	F	M	A	M	J	J	A	S	O	N	D
1.												
2.												
3.												
4.												
5.												



NOTES
