

Financial Goals Worksheet

Short-Term Goals: Financial priorities that can be accomplished less than 1 year. Example: emergency fund, savings, gift savings, vacation savings, car savings, IRA.

Goal	Target Date	Cost Estimate	Amount Saved	Amount Monthly
1.				
2.				
3.				
4.				

Tip: If not on target what habit can you do to eliminate on spending to reach your goal.

Mid-Term Goals: Financial priorities that can be accomplished within 1-5 years. Pay off Debt!

Goal	Target Date	Cost Estimate	Amount Saved	Amount Monthly
1.				
2.				
3.				
4.				

Tip: Make a list and a budget and stick to it! Go shopping on a full stomach. Will Power!

Long-Term Goals: Financial priorities that can be accomplished over 5 years. Future Freedom!

Goal	Target Date	Cost Estimate	Amount Saved	Amount Monthly
1.				
2.				
3.				
4.				

Tip: Create good habits for saving for emergency money, savings account, investments, Investment property, 401K, IRA.

