

# Goals Worksheet

## *Steps to Get Rid of That Annoying Financial Stressor*

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Use this worksheet to map out how you are going to take control of your short-term finances.

*Tips to win: Sometimes the Annoying Financial Stressor is really big and maybe can't go away in 1 year. BUT, you can still make major progress in 12 months to give yourself momentum. Be realistic, don't shoot for the moon if you're not willing to get really really uncomfortable. Ideas could include debt reduction, savings increased, budget management, purchase made, etc., but be specific and list details. And if you are ready to shoot for the moon, find someone who will help you stay accountable.*

### **Step 1. What makes you most stressed out or anxious about your current financial situation?**

*This is your Annoying Financial Stressor (ATS.)*

### **Step 2. Brainstorm. Without thinking too hard, write down at least 10 different ways you can fix your Annoying Financial Stressor?**

*These can sound dumb or unrealistic, that's okay! Just write the first 10 things that come to your mind.*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

### **Step 3. How would you feel and what opportunities would you have if this Annoying Financial Stressor was out of your life (or under control)?**

*This is your Why.*

**Step 4. Write down exactly what you want with your Annoying Financial Stressor 1 year from now.**

*This is your goal.*

**Step 5. Map it out and track your progress.**

To reach my goal, I will complete these tasks in the next 6 months.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

To reach my goal, I will complete these tasks in the next 3 months.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

To reach my goal, I will complete these tasks in the next 30 days.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

To reach my goal, I will complete these tasks in the next week.

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- \_\_\_\_\_
- \_\_\_\_\_

To reach my goal, I will do these things TODAY.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_