20_____ Financial goals

Setting goals is the first step in turning the invisible into the visible. ~Tony Robbins

Short-term goals:

What do I want to achieve this year?

1. _____
2. _____
3. _____

Mid-term Goals:

What do I want to achieve in the next 5 years?

1. _____
2. _____
3. _____

Long-term Goals:

What do I want to achieve in the next 10 years?

1. _____
2. _____
3. _____

ACTION PLAN:

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

FINANCIAL GOALS *Month:* _____

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Short-term goals:
What do I want to achieve this year?

1. _____
2. _____
3. _____

Mid-term Goals:
What do I want to achieve in the next 5 years?

1. _____
2. _____
3. _____

Long-term Goals:
What do I want to achieve in the next 10 years?

1. _____
2. _____
3. _____

MONTHLY ACTION PLAN:

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

NET WORTH CALCULATOR

Let's play detective with your money! List your cool stuff and debts here, subtract one from the other, and voilà – your total net worth is the superstar on the bottom line!

| ASSET	VALUE	DEBT	EQUITY
REAL ESTATE:	$	– $	= $
REAL ESTATE:	$	– $	= $
REAL ESTATE:	$	– $	= $
AUTO:	$	– $	= $
AUTO:	$	– $	= $
AUTO:	$	– $	= $
CASH	$	– $	= $
CHECKING ACCOUNT(S)	$	– $	= $
SAVINGS ACCOUNT(S)	$	– $	= $
RETIREMENT ACCOUNT(S)	$	– $	= $
CASH VALUE	$	– $	= $
INVESTMENT:	$	– $	= $
INVESTMENT:	$	– $	= $
INVESTMENT:	$	– $	= $
INSURANCE (CASH VALUE)	$	– $	= $
HOUSEHOLD ITEMS	$	– $	= $
JEWELRY	$	– $	= $
ANTIQUES	$	– $	= $
BOAT/ATV/ETC.	$	– $	= $
	$	– $	= $
	$	– $	= $
	$	– $	= $
TOTAL OTHER DEBT		– $	
	$	– $	$
	(TT VALUE)	(TT DEBT)	(TT EQUITY)

50-30-20 RULE

The 50-30-20 Rule is a way of allocating your budget into **3** main categories.
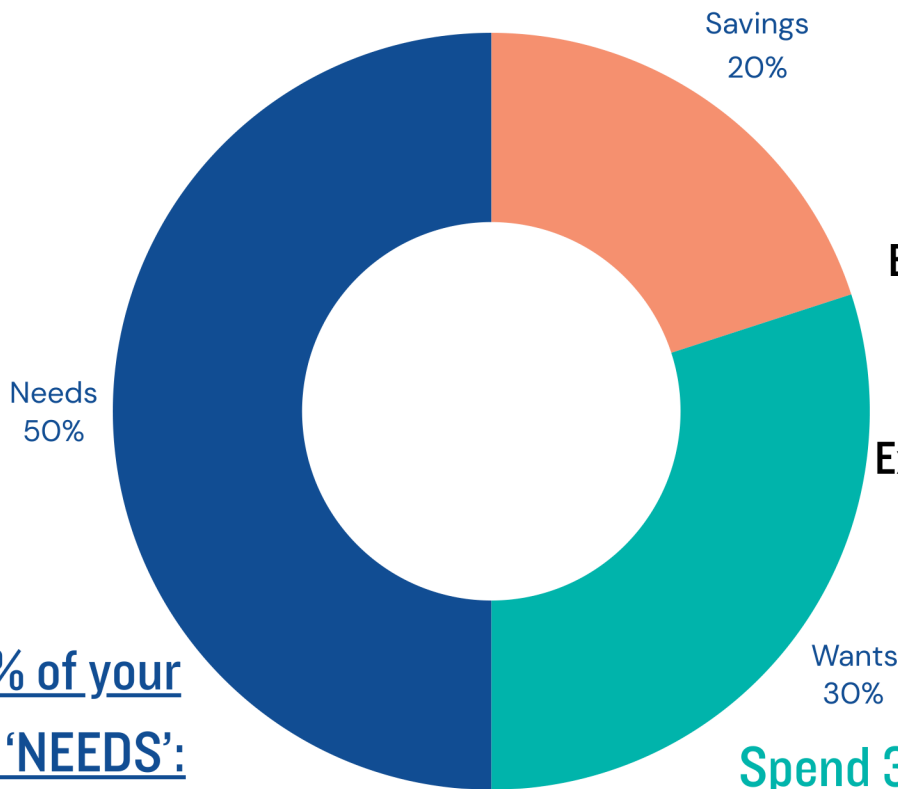
Savings
20%

SAVE 20% of your Budget for:
Savings, Emergency Fund, Retirement, Sinking Funds, Extra towards debt

Needs
50%

Wants
30%

Spend 50% of your Budget on 'NEEDS':
(Items that are necessary) Housing, Utilities, Food, Transportation, Health Insurance, Child care, minimum on debts

Spend 30% of your Budget on 'WANTS':
Dining Out, Subscriptions, Entertainment, items that make life comfortable but not necessary