



FINANCIAL GOALS WORKSHEET

Written goals are important. A written goal brings clarity and focus. It gives you a direction. By reviewing your goals throughout the semester or year, you not only reaffirm what your goals are, but you ensure the goals are still relevant. With the passing of time you may have found new insights that bring greater clarity and focus to your goals and life. A written goal is a powerful reminder you can use to keep yourself on track to attain greater success in your financial life, because any success point in your future financial life requires action **today**.

Short-Term Goals

Financial priorities that will be accomplished by _____ [MONTH/YEAR]

Goal	Target Date	Cost Estimate	Amount Already Saved/Paid	Amount Needed Per Month to Reach Goal
1.				
2.				
3.				

Mid-Term Goals

Financial priorities that will be accomplished by _____ [MONTH/YEAR]

Goal	Target Date	Cost Estimate	Amount Already Saved/Paid	Amount Needed Per Month to Reach Goal
1.				
2.				
3.				

Long-Term Goals

Financial priorities that will be accomplished by _____ [MONTH/YEAR]

Goal	Target Date	Cost Estimate	Amount Already Saved/Paid	Amount Needed Per Month to Reach Goal
1.				
2.				
3.				