

Financial Goals Worksheet



Importance of Written Goals

A written goal brings clarity and focus. It gives you a direction. By reviewing your goals throughout a 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 goal 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.

Short-Term Goals

Financial objective to be accomplished by _____ {DATE}

Goal	Target Date	Cost Estimate	Amount Already Saved/Paid	Amount Needed Monthly to Reach Goal

Mid-Term Goals

Financial objective to be accomplished by _____ {DATE}

Goal	Target Date	Cost Estimate	Amount Already Saved/Paid	Amount Needed Monthly to Reach Goal

Long-Term Goals

Financial objective to be accomplished by _____ {DATE}

Goal	Target Date	Cost Estimate	Amount Already Saved/Paid	Amount Needed Monthly to Reach Goal