

Financial Goals Worksheet

Complete the worksheet below. Fill out steps one through six for a **short-term financial goal** you have. Use the worksheet on the next page to complete step 3.

Remember, short-term financial goals can be accomplished within one year.

Step 1	•What is your goal? _____ _____
Step 2	•What is the target date for reaching your goal? _____
Step 3	•What is the estimated cost? _____
Step 4	•Can you cut back on current spending to put toward your goal? _____
Step 5	•Can you increase income to put money toward your goal? _____
Step 6	•How much money will you need to save monthly? _____

Financial Goals Worksheet

To estimate the cost associated with reaching your goal, identify how much each component will cost and then the total amount needed (e.g., for vacation goal, list the cost of travel, hotel room, food, spending money needed, etc.).

Estimated Expenses	Cost
Total amount needed:	

Financial Goals Worksheet

Complete the worksheet below. Fill out steps one through six for a *intermediate financial goal* you have. Use the worksheet on the next page to complete step 3.

Remember, short-term financial goals can be accomplished in *between one and five years*.

Step 1 •What is your goal? _____

Step 2 •What is the target date for reaching your goal? _____

Step 3 •What is the estimated cost? _____

Step 4 •Can you cut back on current spending to put toward your goal? _____

Step 5 •Can you increase income to put money toward your goal? _____

Step 6 •How much money will you need to save monthly? _____

Financial Goals Worksheet

To estimate the cost associated with reaching your goal, identify how much each component will cost and then the total amount needed (e.g., for vacation goal, list the cost of travel, hotel room, food, spending money needed, etc.).

Estimated Expenses	Cost
Total amount needed:	

Financial Goals Worksheet

Complete the worksheet below. Fill out steps one through six for a **long-term financial goal** you have. Use the worksheet on the next page to complete step 3.

Remember, short-term financial goals can be accomplished in **five years or more**.

Step 1 • What is your goal? _____

Step 2 • What is the target date for reaching your goal? _____

Step 3 • What is the estimated cost? _____

Step 4 • Can you cut back on current spending to put toward your goal? _____

Step 5 • Can you increase income to put money toward your goal? _____

Step 6 • How much money will you need to save monthly? _____

Financial Goals Worksheet

To estimate the cost associated with reaching your goal, identify how much each component will cost and then the total amount needed (e.g., for vacation goal, list the cost of travel, hotel room, food, spending money needed, etc.).

Estimated Expenses	Cost
Total amount needed:	