



Name _____ Date _____

FINANCIAL GOALS

SHORT-TERM GOALS: Financial priorities that can be accomplished within 3-6 months.

| GOAL | TARGET DATE | COST ESTIMATE | AMOUNT ALREADY SAVED/PAID | AMOUNT NEEDED PER MONTH |
|------|-------------|---------------|---------------------------|-------------------------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

Progress as of _____
 (Describe your progress) _____

MID-TERM GOALS: Financial priorities that can be accomplished within 6 months-1 year.

| GOAL | TARGET DATE | COST ESTIMATE | AMOUNT ALREADY SAVED/PAID | AMOUNT NEEDED PER MONTH |
|------|-------------|---------------|---------------------------|-------------------------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

Progress as of _____
 (Describe your progress) _____

LONG-TERM GOALS: Financial priorities that may take longer than 1 year.

| GOAL | TARGET DATE | COST ESTIMATE | AMOUNT ALREADY SAVED/PAID | AMOUNT NEEDED PER MONTH |
|------|-------------|---------------|---------------------------|-------------------------|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |

Progress as of _____
 (Describe your progress) _____

