



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) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_