

Financial Goal Setting Worksheet



Step 1: Set financial goals. Start by listing your goals and categorizing them.

Short-Term Goals (Less than 1 year)	Mid-Term Goals (1-5 years)	Long-Term Goals (More than 5 years)
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____

Step 2: Prioritize your top 5 goals and start planning how you can achieve them.

Goal	Timeframe	Amount Needed	Starting Amount	Budget Goal	How
<i>Car Down Payment</i>	<i>12 months</i>	<i>\$4,000 (20% down on \$20,000 car)</i>	<i>\$2,500</i>	<i>\$1,500 (\$125/month)</i>	<i>Save \$30 each week by packing lunch and skipping Starbucks</i>
1.					
2.					
3.					
4.					
5.					