

Setting Financial Goals Effectively



1. Circle the number that shows how comfortable you feel in each of the following areas with 0 being low and 10 being high.

	Low										High
Budgeting	0	1	3	4	5	6	7	8	9	10	
Debt	0	1	3	4	5	6	7	8	9	10	
Credit Score	0	1	3	4	5	6	7	8	9	10	
Banking	0	1	3	4	5	6	7	8	9	10	
Savings	0	1	3	4	5	6	7	8	9	10	
Emergency Savings	0	1	3	4	5	6	7	8	9	10	
Major Purchase	0	1	3	4	5	6	7	8	9	10	
Insurance	0	1	3	4	5	6	7	8	9	10	
Retirement	0	1	3	4	5	6	7	8	9	10	

2. Which one area do you most want to improve?

- | | | |
|---------------------------------------|--|---|
| <input type="checkbox"/> Budgeting | <input type="checkbox"/> Banking | <input type="checkbox"/> Major Purchase |
| <input type="checkbox"/> Debt | <input type="checkbox"/> Savings | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Credit Score | <input type="checkbox"/> Emergency Savings | <input type="checkbox"/> Retirement |

3. What financial goal could you set for that area?

My goal is _____

4. What could you do to make progress towards that goal?

In the next week, I will _____

In the next month, I will _____



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