

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	1	2	3	4	5	6	7	8	9	10
Debt	1	2	3	4	5	6	7	8	9	10
Credit Score	1	2	3	4	5	6	7	8	9	10
Banking	1	2	3	4	5	6	7	8	9	10
Savings	1	2	3	4	5	6	7	8	9	10
Emergency Savings	1	2	3	4	5	6	7	8	9	10
Major Purchase	1	2	3	4	5	6	7	8	9	10
Insurance	1	2	3	4	5	6	7	8	9	10
Retirement	1	2	3	4	5	6	7	8	9	10

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

- ☐ Budgeting
☐ Debt
☐ Credit Score

- ☐ Banking
☐ Savings
☐ Emergency Savings

- ☐ Major Purchase
☐ Insurance
☐ 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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