



Goal-setting Worksheet

*Name at least one short-, medium- and long-term goal and the amount of the goal.

Short-term Goals — up to 12 months

*Examples include creating an emergency fund, saving for personal goods or travel and credit card debt payments.

- 1. _____ \$ _____
- 2. _____ \$ _____
- 3. _____ \$ _____
- 4. _____ \$ _____
- 5. _____ \$ _____

The total of short-term goals = \$ _____

Divide by number of months = \$ _____
required per month

Short-term goals = \$ _____ per month

Medium-term Goals — 1 to 5 years

*Examples include saving for the down payment of a home, buying or replacing your car and paying off unsecured debts. Unsecured debts are debts that are not backed by collateral, such as credit card debt or student loans.

- 1. _____ \$ _____
- 2. _____ \$ _____
- 3. _____ \$ _____
- 4. _____ \$ _____
- 5. _____ \$ _____

The total of medium-term goals = \$ _____

Divide by number of months = \$ _____
required per month

Medium-term goals = \$ _____ per month

Long-term Goals — more than 5 years

*Examples include creating a retirement fund, paying off a mortgage and saving for a child's college tuition.

- 1. _____ \$ _____
- 2. _____ \$ _____
- 3. _____ \$ _____
- 4. _____ \$ _____
- 5. _____ \$ _____

The total of long-term goals = \$ _____

Divide by number of months = \$ _____
required per month

Long-term goals = \$ _____ per month

GOALS TOTAL = \$ _____





Short-term Goal Worksheet

My financial goals for the year of _____.

To Pay Off

Credit Card/Loan	Amount to Date	Goal Amount

To Save For

Vacation, Renovations, Gifts	Goal Amount Needed	Goal Deadline