

Personal Financial Goals Worksheet

Name: _____ Date: _____

Personal Financial Goals

Purpose: To identify personal financial goals and create an action plan to get you going in

Instructions: Based on personal and household needs and values, identify specific goals

Short-Term Monetary Goals (less than one year)

| Description | Amount needed | Months to achieve | Action to be taken | Priority |
|--------------------------------------|---------------|-------------------|---------------------------|-------------|
| <i>Example : pay off credit card</i> | \$850 | 10 | <i>Use money from pay</i> | <i>High</i> |
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Intermediate and Long-term Monetary Goals

| Description | Amount needed | Months to achieve | Action to be taken | Priority |
|-------------|---------------|-------------------|--------------------|----------|
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Nonmonetary Goals

| Description | Time frame | Action to be taken |
|--|------------------------|---|
| <i>Example: set up file for personal financial records and</i> | <i>Next 2-3 months</i> | <i>. Locate personal and financial records and documents.</i> |
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What's Your Next Step?

* Based on various financial goals, calculate the savings deposits necessary to achieve