



Name _____ Date _____

FINANCIAL GOALS

SHORT-TERM GOALS: Financial priorities that can be accomplished within 3-6 months.

GOAL	TARGET DATE	COST ESTIMATE	AMOUNT ALREADY SAVED/PAID	AMOUNT NEEDED PER MONTH
1.				
2.				
3.				
4.				

Progress as of _____
(Describe your progress) _____

MID-TERM GOALS: Financial priorities that can be accomplished within 6 months-1 year.

GOAL	TARGET DATE	COST ESTIMATE	AMOUNT ALREADY SAVED/PAID	AMOUNT NEEDED PER MONTH
1.				
2.				
3.				
4.				

Progress as of _____
(Describe your progress) _____

LONG-TERM GOALS: Financial priorities that may take longer than 1 year.

GOAL	TARGET DATE	COST ESTIMATE	AMOUNT ALREADY SAVED/PAID	AMOUNT NEEDED PER MONTH
1.				
2.				
3.				
4.				

Progress as of _____
(Describe your progress) _____

