

Financial Goals Worksheet

A financial goal is something that requires more money than you have right now.

Short-term goal < 1 year Mid-term goal = 1–5 years Long-term goal > 5 years

To get started, answer some questions:

1. What is your goal? _____
2. When do you want to achieve it? _____
3. How much will it cost? _____

Then fill in these charts:

HOW MUCH MY GOAL COSTS	MINUS	HOW MUCH I ALREADY HAVE	EQUALS	HOW MUCH MORE I NEED
Example: \$500	–	\$50	=	\$450
	–		=	
	–		=	



HOW MUCH MORE I NEED	DIVIDED BY	# OF MONTHS I HAVE TO ACHIEVE IT	EQUALS	AMOUNT I NEED TO SAVE PER MONTH
\$450	/	10	=	\$45
	/		=	
	/		=	