

Financial Goals Worksheet

Date: / /

Tip: Revise your goals 4 times a year.

Your financial goals are specific things you want to do with your money within a certain time period. Short-range goals are accomplished within one year, mid-range goals are accomplished within 2 to 5 years, and long-range goals generally take more than 5 years to achieve. Use this worksheet to help set your goals.

	Target Date	Target Needed	Current Savings	Additional Savings Needed	Pay Periods Until Target Date	Savings Needed Per Pay Period	Savings Needed Per Month
Short Range Goals <i>Ex: Christmas</i>	<i>November 1st</i>	<i>\$1,000</i>	<i>\$200</i>	<i>\$800</i>	<i>18</i>	<i>\$44.44</i>	<i>\$88.88</i>
Mid Range Goals							
Long Range Goals							

