

Financial Goals Worksheet

Turn vague money wishes into clear goals with amounts and dates. Write them down to make them real.

SHORT-TERM (WITHIN 1 YEAR)

Goal: _____

Amount & date: _____

Goal: _____

Amount & date: _____

MID-TERM (1–5 YEARS)

Goal: _____

Amount & date: _____

Goal: _____

Amount & date: _____

LONG-TERM (5+ YEARS)

Goal: _____

Amount & date: _____

Goal: _____

Amount & date: _____

MY FIRST STEP THIS MONTH
