

FINANCIAL GOALS WORKSHEET



My financial goals: *S.M.A.R.T.*

My goals are measurable, time related, feasible and pertinent.

Name: _____

Date: _____

	Description of Goal	\$	How Long Will It Take?	Priority (*)	Monthly Amounts
1)	_____	_____	_____	_____	_____
2)	_____	_____	_____	_____	_____
3)	_____	_____	_____	_____	_____
4)	_____	_____	_____	_____	_____
5)	_____	_____	_____	_____	_____
6)	_____	_____	_____	_____	_____
7)	_____	_____	_____	_____	_____
8)	_____	_____	_____	_____	_____
9)	_____	_____	_____	_____	_____
10)	_____	_____	_____	_____	_____

Signature _____

Signature _____

- (*) Assigning priority:
#1 - Very important (Total monthly amount \$ _____)
#2 - Important
#3 - Not so important
#4 - Nice to have

