

FINANCIAL GOALS

Write it down · give it a deadline · track it every month

YEAR _____

DATE _____

A goal without a number and a date is just a wish. Give every goal both.

MY MONEY PLAN

MY #1 MONEY GOAL RIGHT NOW

THE GOAL

WHY IT MATTERS TO ME

TARGET AMOUNT

\$

SAVE PER MONTH

\$

REACH IT BY

SAVE PER PAYCHECK

\$

Short-Term Goals

0–12 months

GOAL

TARGET \$

BY WHEN

\$ / MONTH

\$

\$

\$

\$

\$

\$

Mid-Term Goals

1–5 years

GOAL

TARGET \$

BY WHEN

\$ / MONTH

\$

\$

\$

\$

\$

\$

Long-Term Goals

5+ years

GOAL

TARGET \$

BY WHEN

\$ / MONTH

\$

\$

\$

\$

TOP GOAL PROGRESS — COLOR IN EACH BLOCK AS YOU SAVE

10%

20%

30%

40%

50%

60%

70%

80%

90%

100%

"Every dollar I set aside is a step toward the life I'm building."

Notes & next steps