

Financial Goals Worksheet

Short-Term Goals (Less than 1 year)

Goal/Strategies/ Why it is important to me?	Total Cost	Duration (# months)	Monthly Cost	Target Date

Intermediate Goals (1-5 years)

Goal/Strategies/ Why it is important to me?	Total Cost	Duration (# years)	Monthly Cost	Target Date

Long-Term Goals (5+ years)

Goal/Strategies/ Why it is important to me?	Total Cost	Duration (# years)	Monthly Cost	Target