

## Financial Goals Worksheet

| Short-Term Goals                                  |             |           |                     |
|---------------------------------------------------|-------------|-----------|---------------------|
| Rank Goal                                         | Target Date | Est. Cost | Monthly Commitments |
| <input type="checkbox"/> Emergency Funds (Note A) | _____       | _____     | _____               |
| <input type="checkbox"/> Pay Off Credit Card Debt | _____       | _____     | _____               |
| <input type="checkbox"/> Purchase Big Ticket Item | _____       | _____     | _____               |
| <input type="checkbox"/> Finance Summer Vacation  | _____       | _____     | _____               |
| <input type="checkbox"/> Christmas/Holiday Fund   | _____       | _____     | _____               |
| <input type="checkbox"/> Other: _____             | _____       | _____     | _____               |

| Medium-Term Goals                               |             |           |                    |
|-------------------------------------------------|-------------|-----------|--------------------|
| Rank Goal                                       | Target Date | Est. Cost | Monthly Commitment |
| <input type="checkbox"/> Down Payment on Home   | _____       | _____     | _____              |
| <input type="checkbox"/> Payoff Student Loans   | _____       | _____     | _____              |
| <input type="checkbox"/> Major Home Improvement | _____       | _____     | _____              |
| <input type="checkbox"/> Funds for a Vacation   | _____       | _____     | _____              |
| <input type="checkbox"/> Funds for a Wedding    | _____       | _____     | _____              |
| <input type="checkbox"/> Other: _____           | _____       | _____     | _____              |

| Long-Term Goals                                     |             |           |                    |
|-----------------------------------------------------|-------------|-----------|--------------------|
| Rank Goal                                           | Target Date | Est. Cost | Monthly Commitment |
| <input type="checkbox"/> Funds for Retirement       | _____       | _____     | _____              |
| <input type="checkbox"/> Funds for College          | _____       | _____     | _____              |
| <input type="checkbox"/> Purchase a Rental Property | _____       | _____     | _____              |
| <input type="checkbox"/> Purchase a Second Home     | _____       | _____     | _____              |
| <input type="checkbox"/> Start a Business           | _____       | _____     | _____              |
| <input type="checkbox"/> Other: _____               | _____       | _____     | _____              |