

WORKSHEET 20—Your Personal Financial Goals Worksheet

Goals	Priority Level (0–5)	Target Date or Time Horizon	Current Total Cost	Future Anticipated Total Cost	Rate of Return*	Required Savings (Annual if multi-year)
Short-Term Goals (less than 1 year)						
Intermediate-Term Goals (1 to 10 years)						
Long-Term Goals (More than 10 years)						

* The rate of return for a debt reduction goal would be the interest rate of the term loan or revolving credit line.