Financial Goal-Setting Worksheet

1	2 Approximate	3 Month & Year	4 Number of	5 Date to	6 Monthly Amount
Goals	Amount Needed	Needed	Months to Save	Start Saving	to Save (2-4)
Short-Term (under 3 years)					
Medium Term (3-10 years)					
Long-Term (10 or more years)					

date prepared ____/___/