

Financial Goal-Setting Worksheet

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

date prepared ____/____/____