

**WORKSHEET 20—Your Personal Financial Goals Worksheet**

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

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