

## Financial Goals Worksheet

Your financial goals are specific things you want to do with your money within a certain time period. Short-term goals are accomplished under 1 year, mid-term goals are accomplished within 1 to 5 years and long-term goals generally take over 5 years to achieve.

|   |  | Target Date | Total Needed | Current Savings | Additional Savings Needed | Pay Periods Until Target Date | Savings Needed Per Pay Period | Savings Needed Per Month |
|---|--|-------------|--------------|-----------------|---------------------------|-------------------------------|-------------------------------|--------------------------|
| <b>Short-term Goals</b><br><br>(under 1 year) |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
| <b>Mid-term Goals</b><br><br>(1-5 years)      |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
| <b>Long-term Goals</b><br><br>(over 5 years)  |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |
|   |  |             |              |                 |                           |                               |                               |                          |