Financial Goals Worksheet

CLIENT _________________________________________

Make goals S*M*A*R*T* - Specific, Measurable, Attainable, Relevant and Time-Framed

1. SAVINGS: ____________________________________________
Each payday I will set aside $___________ to meet this goal.

2. HOUSING:
I will graduate from my classes by______________________________
I will be in my own home by______________________________
I still have to _______________________________________________

3. FAMILY:
I would like to be able to ______________________________________

____________________________________________________________
By next year __________________________________________________
In the next 5 years ___________________________________________

4. TRANSPORTATION: _______________________________________

____________________________________________________________

5. THE BUDGET: ____________________________________________
Some attention really needs to be paid to__________________________

____________________________________________________________
More $’s need to go toward_____________________________________
Less $’s need to go toward_____________________________________

6. CAREER:
At work I need to ___________________________________________________________________________________

__________________________________________________________________________________________________
In the future I would like to ___________________________________________________________________________

__________________________________________________________________________________________________

7. OTHER: _________________________________________________

__________________________________________________________________________________________________