

Powercat Financial Counseling

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:** _____