

# What are your financial goals?

## Step 1: Identify

What are you working toward?



Pay off debt



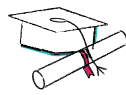
Down payment



Save for retirement



Start emergency fund



Save for college



Something else

How far away is your goal?



## Step 2: Prioritize

How important is this goal?

Do or die

Pretty important

A want but not a need

A nice to have

## Step 3: Quantify

How much do you need for your goal?

- \$0 – \$1,000
- \$1,000 – \$10,000
- \$10,000 – \$50,000
- \$50,000 – \$200,000
- \$200,000 – \$500,000
- \$500,000+

How much have you saved so far?

- \$0 – \$1,000
- \$1,000 – \$10,000
- \$10,000 – \$50,000
- \$50,000 – \$200,000
- \$200,000 – \$500,000
- \$500,000+

What can you commit to saving each month?

\$

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## Step 4: Make a plan!

- Print out the next page, fill it out, and hang it up somewhere you'll see it regularly!
- Stick to your savings goals the best you can
- Check your progress every few months
- Revisit and revise as needed
- If you fall off track—that's ok! Make a new plan and keep at it. You're doing great!

# MY FINANCIAL GOALS

## Goal #1



What I'm working toward:

Timeline:

Priority:

How much I need:

What I'll save each month:

## Goal #2



What I'm working toward:

Timeline:

Priority:

How much I need:

What I'll save each month:

## Goal #3



What I'm working toward:

Timeline:

Priority:

How much I need:

What I'll save each month:

## Goal #4



What I'm working toward:

Timeline:

Priority:

How much I need:

What I'll save each month: