



Setting Financial Goals

Use this worksheet to get a handle on your financial priorities. List your financial goals for the short term, medium term, and long term.

| | |
|--------------------------------|---------------------------------|
| Short-term goals: up to 1 year | The Total of short term goals = |
| 1. | \$ |
| 2. | \$ |
| 3. | \$ |
| 4. | \$ |
| 5. | \$ |

Divide by 12 months = \$ required per month for short term goals.

| | |
|----------------------------------|----------------------------------|
| Medium-term goals: up to 3 years | The Total of medium term goals = |
| 1. | \$ |
| 2. | \$ |
| 3. | \$ |
| 4. | \$ |
| 5. | \$ |

Divide by 36 months = \$ required per month for medium term goals.



| Long-term goals: up to 5 years | The Total of long term goals = |
|--------------------------------|--------------------------------|
| 1. | \$ |
| 2. | \$ |
| 3. | \$ |
| 4. | \$ |
| 5. | \$ |

Divide by 60 months = \$ required per month for long term goals.

Long, medium and short PER MONTH TOTALS = \$ (into savings account each month)