

Financial Goals Worksheet

Split what you are saving for by how far away it is, then give every goal a date and a monthly amount.

Filled in on: _____

Amount I can save each month: _____

Short term - under 1 year	Amount needed	Target date	Each month	Where the money sits	Saved so far

Medium term - 1 to 5 years	Amount needed	Target date	Each month	Where the money sits	Saved so far

Long term - over 5 years	Amount needed	Target date	Each month	Where the money sits	Saved so far

The goal that matters most right now

First step: _____

By when: _____

Review this sheet on: _____