Financial Goals Worksheet

|  | Short Term <br> $0-12$ months | Mid Term <br> $2-5$ years | Long Term <br> 5 years or more |
| :--- | :--- | :--- | :--- |
| Name of Goal |  |  |  |
| Total Cost of Goal |  |  |  |
| Number of months to <br> achieve goal |  |  |  |
| *Monthly Savings |  |  |  |
| How will you achieve the <br> goal? |  |  |  |

*Monthly Savings $=$ Total Cost of Goal $\div$ Total Number of Months to Achieve Goal
Notes:

