Financial goals worksheet

One goal per page. Be exact: a number and a date.

My goal	
How much it costs	
I want it by	
Already saved or paid	
Still to go	
Paydays until then	
Per payday Still to go divided by paydays	

Why I want it

What could get in the way

Steps

	Step	By	Done on
☐			
☐			
☐			
☐			
☐			
☐			
☐			

Progress

5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95% 100%

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Short, medium and long term

Sort your goals by when you need the money.

This year

Goal	Amount	Date	Per month	Kept in
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	

1 to 5 years

Goal	Amount	Date	Per month	Kept in
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	

More than 5 years

Goal	Amount	Date	Per month	Kept in
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	
	$		$	

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90 day plan

Three months is long enough to see a result and short enough to stay interested.

From _____ To _____ Main goal _____

Month 1

Target $ _____

Step 1 _____

Step 2 _____

Step 3 _____

Result $ _____

Month 2

Target $ _____

Step 1 _____

Step 2 _____

Step 3 _____

Result $ _____

Month 3

Target $ _____

Step 1 _____

Step 2 _____

Step 3 _____

Result $ _____

Weekly check

Week	What I did	Saved or paid	Total
1		$	$
2		$	$
3		$	$
4		$	$
5		$	$
6		$	$
7		$	$
8		$	$
9		$	$
10		$	$
11		$	$
12		$	$
13		$	$

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