



Financial Goals Worksheet

Your financial goals are specific things you want to do with your money within a certain time period. Short-term goals are accomplished under 1 year, mid-term goals are accomplished within 1 to 5 years and long-term goals generally take over 5 years to achieve.

		Target Date	Total Needed	Current Savings	Additional Savings Needed	Pay Periods Until Target Date	Savings Needed Per Pay Period	Savings Needed Per Month
Short-term Goals (under 1 year)								
Mid-term Goals (1-5 years)								
Long-term Goals (over 5 years)								