

FINANCIAL GOAL BRAINSTORMING

SHORT TERM

1-12 months

MEDIUM TERM

1-3 Years

LONG TERM

3+ Years

FINANCIAL GOAL SETTING WORKSHEET

GOAL
Make goals SMART**

ROADBLOCKS
List possible obstacles you may face

ACTION PLAN
Outline steps required to accomplish goal

GOAL

Amount

\$

Target Date

GOAL

Amount

\$

Target Date

GOAL

Amount

\$

Target Date

GOAL

Amount

\$

Target Date

**SMART = Specific, Measurable, Achievable, Relevant, Time-based

**Past 30 days
Estimated Expenses
Complete in Class**

- 1. Groceries _____
- 2. Dining out _____
- 3. Household Supplies _____
- 4. Gas _____
- 5. Clothing _____
- 6. Personal Care _____
- 7. Entertainment _____
- 8. Pet care _____
- 9. Gifts _____
- 10. Tobacco/Alcohol/Lottery _____

**Past 30 days
Actual Expenses
Complete at Home**

- 1. Groceries _____
- 2. Dining out _____
- 3. Household Supplies _____
- 4. Gas _____
- 5. Clothing _____
- 6. Personal Care _____
- 7. Entertainment _____
- 8. Pet care _____
- 9. Gifts _____
- 10. Tobacco/Alcohol/Lottery _____

Increase Income

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Reduce Expenses

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Periodic Expenses

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____