

Financial Goals Worksheet

This worksheet will help you map out three financial goals you wish to achieve. (Note: your third financial goal is already identified—having a financially secure retirement!) Please write down in the space below two other financial goals you wish to accomplish. Be sure to provide specific details on the timeline, cost, and motivation for all three financial goals.

Do not include debt reduction goals below, but rather capital accumulation goals. Strategies for debt reduction will be addressed in the next section of this workbook.

① Financial Goal: _____	By When? (Month/Year) _____
How Much Will It Cost? _____	Why is accomplishing this goal important to you? _____

② Financial Goal: _____	By When? (Month/Year) _____
How Much Will It Cost? _____	Why is accomplishing this goal important to you? _____

③ Financial Goal: <i><u>Financially Secure Retirement</u></i> _____	By When? (Month/Year) _____
How Much Will It Cost? _____	Why is accomplishing this goal important to you? _____