

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) | | | | | | | | |
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| Mid-term Goals (1-5 years) | | | | | | | | |
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| Long-term Goals (over 5 years) | | | | | | | | |
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