

Financial Goals Worksheet

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

	Target Date	Total Needed	Current Savings	Add'l 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)							