

Savings Goals Worksheet



Think of goals as dreams with deadlines. The first step in personal financial planning is to know what you want and then make a plan on how to get there. Be S.M.A.R.T. when establishing your goals: Specific, Meaningful, Attainable, Realistic, and Time-Related. In establishing your financial goals, remember to include building an emergency fund and paying down debt. Use this form to help you identify your need for emergency savings, short- and long-term financial goals, and a time frame for achieving them

Step 1: Short Term Goals

Financial goals you wish to achieve in one year or less.

Item	Specific Cost	Target Date	Amount To Save Monthly	Comments

Step 2: Mid Term Goals

Financial goals you wish to achieve in one to five years.

Item	Specific Cost	Target Date	Amount To Save Monthly	Comments

Step 3: Long Term Goals

Financial goals you wish to achieve in five or more years.

Item	Specific Cost	Target Date	Amount To Save Monthly	Comments

To keep motivated in achieving your financial goals, write them down on a piece of paper and put them in your wallet or displayed around your house to remind you of what you are working for.