

# Financial Goals Worksheet



Your financial goals are the milestones that matter most to you. Whether you're planning for something just around the corner or further down the road, documenting your financial goals is a great way to plan for financial success. Short-term goals can typically be achieved in less than one year, mid-term goals can be accomplished within one to five years, and long-term goals generally take over five 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
<b>SHORT-TERM GOALS</b> (under 1 year)		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			
<b>MID-TERM GOALS</b> (1-5 years)		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			
<b>LONG-TERM GOALS</b> (over 5 years)		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			
		\$	\$	\$			