

EVALUATE YOUR FINANCIAL GOALS

Use the worksheet below to list your financial goals and calculate the time and dollar amount required to achieve them. Be sure to categorize your goals according to the time frames suggested below. Review and update the worksheet periodically.

1 Goals	2 Approximate \$ amount needed	3 Month and year needed	4 Number of months to save	5 Date to start saving	6 Monthly \$ amount to save (col. 2 ÷ col. 4)
Short-term (less than 3 years)					
Intermediate – term (3-10 years)					
Long-term (more than 10 years)					

Date prepared ____/____/____