

name: _____

date: _____



setting your financial goals

short-range goal (within 1 month)

Goal: _____

Objective \$ _____
Estimated Cost \$ _____
Target Date \$ _____
Monthly Amount \$ _____

medium-range goal (2-12 months)

Goal: _____

Objective \$ _____
Estimated Cost \$ _____
Target Date \$ _____
Monthly Amount \$ _____

long-range goal (more than 1 year)

Goal: _____

Objective \$ _____
Estimated Cost \$ _____
Target Date \$ _____
Monthly Amount \$ _____