

# Financial Goals Worksheet

This worksheet is designed to help you create individual financial goals. For each goal, you have the option of designating it as:

- Short-term (fewer than three years)
- Intermediate (between three and 10 years)
- Long-term (more than 10 years)

Click each box to begin customize your goals. In the “My Notes” column, list your action steps, resource you’ll need to support you as you work toward your goals, potential challenges, etc. Save the file to your desktop or mobile device after completing it.

**Note:** The first one is provided as an example. Clicking each box will give you a blank space where you can type.

	Goals	Length of Goal	Total	Monthly \$	Timeframe		My Notes
					Start	End	
1							
2							
3							
4							
5							
6							
7							
8							

