

Money Goals Worksheet

Define what you are working toward across three time horizons. Fill in a target amount, a target date, and a first step for each goal.

SHORT TERM GOAL

Within the next 12 months.

Goal: _____

Target amount: _____

Target date: _____

First step: _____

MEDIUM TERM GOAL

One to five years out.

Goal: _____

Target amount: _____

Target date: _____

First step: _____

LONG TERM GOAL

Five years or more.

Goal: _____

Target amount: _____

Target date: _____

First step: _____

NOTES
