



Financial Goal Setting Worksheet

SMART Goals

S – Specific

M – Measurable

A – Achievable, Attainable

R – Relevant, Realistic

T – Time-based, Time-measured

SMART Goal Examples

I will pay off my \$5,000 in credit card debt in the next 2 years.

I will save \$8,000 in an emergency fund in the next 3 years.

I will track my spending and follow a budget using an app on my phone for the next 3 months.

Short term goal: 1-2 years

Goal: _____

Steps to achieve: _____

Resources needed: _____

Mid term goal: 3-10 years

Goal: _____

Steps to achieve: _____

Resources needed: _____

Long term goal: 11-20 years

Goal: _____

Steps to achieve: _____

Resources needed: _____
