

# Financial Wellbeing

## Financial Goals Worksheet



Your financial goals are specific things you want to do with your money within a certain time period. Short-term goals are accomplished under 1 year, mid-term goals are accomplished within 1 to 5 years and long-term goals generally take over 5 years to achieve.

Identify one or two financial goals that you can focus on during the Financial Wellbeing program. You can add additional goals later if you'd like.

At this time, you only need to fill the first two columns (Target Date and Total Needed). If you don't have an exact number in mind, just estimate what you think you'll need. You can complete this form as you gather information later.

Financial Goals		Target Date	Total Needed	Current Savings	Additional Savings Needed	Pay Periods Until Target Date	Savings Needed Per Pay Period	Savings Needed Per Month
Short-term goals								
Mid-term goals								
Long-term goals								