



Setting Financial Goals

The number of goals you set is up to you. It is helpful to estimate as best you can the time frame for each goal and the amount of money involved based on your lifestyle. Be as specific as possible.

	Short term Within next year	Medium term Within 5 years	Long term Next 5-10 years	Longest term Over 5-10 years
Religious/charitable giving	\$ _____	\$ _____	\$ _____	\$ _____
Build up emergency reserve	\$ _____	\$ _____	\$ _____	\$ _____
Achieve adequate retirement income by funding retirement plans [403(b), TSA, 401(k), IRA]	\$ _____	\$ _____	\$ _____	\$ _____
Buy adequate insurance	\$ _____	\$ _____	\$ _____	\$ _____
Pay off credit cards	\$ _____	\$ _____	\$ _____	\$ _____
Create a college fund	\$ _____	\$ _____	\$ _____	\$ _____
Buy a car	\$ _____	\$ _____	\$ _____	\$ _____
Save down payment for house	\$ _____	\$ _____	\$ _____	\$ _____
Make home improvements	\$ _____	\$ _____	\$ _____	\$ _____
Pay off mortgage early	\$ _____	\$ _____	\$ _____	\$ _____
Take a vacation	\$ _____	\$ _____	\$ _____	\$ _____
Start a business	\$ _____	\$ _____	\$ _____	\$ _____
Change jobs	\$ _____	\$ _____	\$ _____	\$ _____
Make a charitable bequest	\$ _____	\$ _____	\$ _____	\$ _____
Take early retirement	\$ _____	\$ _____	\$ _____	\$ _____
Help child finance home	\$ _____	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____

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