



Setting Personal Financial Goals

1. **List the financial goals** you want to accomplish — both for the next 3 years and in the future.
2. **Prioritize the goals** in order of importance. Which goals can be put off if you need to commit more resources to some of the other goals?
3. **Assign a completion date** to each goal. (Remember, you may need to accomplish some of your short term goals before you begin to work on the long term goals.)
4. **Estimate a cost** for each of the goals.

My goals for the next 3 years

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Priority	Date (mm/yy)	Cost

My goals for the future

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Priority	Date (mm/yy)	Cost