Financial Goal-Setting Worksheet

1 Goals	2 Approximate Amount Needed	3 Month & Year Needed	4 Number of Months to Save	5 Date to Start Saving	6 Monthly Amount to Save (2-4)
Short-Term (under 3 years)	7 Amount 1 vected	recucu	Wonds to Save	Start Saving	10 5470 (2 4)
(
Medium Term (3-10 years)					
Long-Term (10 or more years)					

Date prepared ____/___/___