
GOAL PLANNING WORKSHEET



MONEYWISE

Instructions: Write/type a goal next to “Goal #1” below and complete the boxes in the “Description” chart. Then use the “What’s My Progress?” boxes to chart progress toward your goal in the coming months. Note: The “Goal #2” box is optional.

If your goal is going to take longer than three months, consider using “Goal #1” as your long-term goal and “Goal #2” as a goal that can be achieved over the next three months. Short-term goals can help you build momentum.

It’s a great idea to structure your goals in a way that shows where you are now and where you want to be when.

Examples:

1. Go from \$500 in savings to \$2,000 in savings by July 1, 2020.
2. Reduce debt balance from \$10,000 to \$7,000 by December 31, 2020.

GOAL #1 (LONG-TERM):

WHAT’S YOUR PROGRESS?

Where Am I Now? _____

Month #1: _____

Short-Term Steps: _____

Month #2: _____

Why This Goal? _____

Month #3: _____

Your Reward? _____

What If It’s Not Met? _____

GOAL #2 (SHORT-TERM):

WHAT’S YOUR PROGRESS?

Where Am I Now? _____

Month #1: _____

Short-Term Steps: _____

Month #2: _____

Why This Goal? _____

Month #3: _____

Your Reward? _____

What If It’s Not Met? _____