



FINANCIAL GOALS WORKSHEET

This worksheet is designed to assess your financial situation, set goals, and create a clear plan to improve your financial health.

STEP 1: YOUR CURRENT FINANCIAL SITUATION

Monthly Income: \$ _____

Monthly Expenses:

Housing: \$ _____

Utilities: \$ _____

Groceries: \$ _____

Transportation: \$ _____

Health: \$ _____

Subscriptions: \$ _____

Pro Tip: List out all of your subscriptions to see how they are affecting your monthly spending.

STEP 2: SET YOUR SMART GOALS

Specific: Is your goal narrow and exact?

Measurable: How will you measure your progress?

Achievable: Is this a realistic goal within the time frame?

Relevant: Does this goal align with your long-term plans?

Time-Bound: Do you have an end date to help task prioritization and increase motivation?

Short-Term (3-6 months): _____

Mid-Term (1 year): _____

Long-Term (5 years): _____



Set your budget percentages to help you reach your goals.

Food: _____%

Transportation: _____%

Misc. Essentials: _____%

Savings: _____%

Debt Repayment: _____%

Discretionary Spending_____ %

What steps will you take each month to achieve your goals?
Track your progress below.

Long-Term

[illegible]