

GOALS WORKSHEET

Getting Where You Want To Be...

Take a moment to think about what is important to you right now and what will be important in the future. Once you've put your goals on paper, you have taken the first important step toward meeting them. Use this chart to begin. Then, review and update this chart periodically to adjust your goals and see if you're on track.

	GOALS	TIME FRAMES	COSTS
	What are your 5 biggest financial goals for your family and yourself? Be specific. Include necessities and niceties.	What are the time frames for your goals? If your goal is ongoing, give the time span — e.g., 2005-2009 for college education.	How much will your goals cost? Keep in mind that even with a 4% inflation rate, costs will double approximately every 18 years.
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