

Financial Goals Worksheet (SMART)

Use this worksheet to create a SMART goal. Identify a goal that is short, mid, and long-term when completing. Make copies of this worksheet for each individual goal.

Today's Date: _____ Start Date: _____ Date Achieved: _____

Verify that your goal is SMART

Specific: *What is your goal? (What? Why? and How?)*

Measurable: *How will you measure your progress? (How many? How much?)*

Achievable: *Is achieving this goal realistic with effort and commitment? What steps are involved?*

Realistic: *What skills and knowledge are necessary to reach the goal? Is it do-able?*

Timely: *When will you achieve this goal?*

This goal is important because: _____

Financial Goals Worksheet - Take Action!

Identify the obstacles you may face when working to achieve your goals, and find solutions.

Potential Obstacles

Potential Solutions

Who are the people you will ask to help you?

Specific Action Steps: *What steps need to be taken to reach your goal?*

What:

Expected completion date:

Completed:

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