



# Financial Goal Setting Worksheet 1

PLAN TO  
SUCCEED

## Instructions

Categorize the financial goals you want to achieve within one, five, and 10 years.

Short-Term Goals	Mid-Term Goals	Long-Term Goals
What do I want to achieve this year?	What do I want to achieve in the next five years?	What do I want to achieve 10 years from now?
1. Create an emergency fund	1. Pay off high-interest credit card debt	1. Save for a down payment on a house
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
6. _____	6. _____	6. _____
7. _____	7. _____	7. _____
8. _____	8. _____	8. _____
9. _____	9. _____	9. _____
10. _____	10. _____	10. _____

