

# Financial Goals

List some things you want that will require financial resources. If you are setting financial goals for the family, each family member should write a list of wants requiring financial resources.

Things I Want That Require Money	
1. _____	5. _____
2. _____	6. _____
3. _____	7. _____
4. _____	8. _____

# Short-term Goals

Goals focus on *what*, what you need or what you want. Some goals you have listed can be achieved in two years or less. These goals are referred to as *short-term goals*.

From the list(s) you prepared, list the short-term goals. Be sure to combine the short-term goals of all family members.

Goals That Can Be Achieved in Two Years or Less	
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

## Long-term Goals

*Long-term goals* relate to what you want to accomplish in five or more years. Long-term goals usually require more resources for achievement. From your list(s) of wants, write down your long-term goals. Include the long-term goals of all family members.

Goals To Be Achieved in Five Years or More	

## Prioritizing Goals

Typically there will be more goals than there are resources available for reaching them. You must now prioritize the goals you have. Most financial planners agree that it is almost impossible to work toward more than two or three goals at once. If you have already identified what you think is important, reaching the goals in order of importance will be fairly easy to do.

Identify the goals in the order you want to reach them. To identify possible conflict, each family member should develop a list of short-term and long-term goals to work toward.

Individual Short- and Long-term Goals to Work Toward		
Goals:	Check the type of goal:	
	Short-term	Long-term
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

# Goal Worksheet

**Goal:** \_\_\_\_\_

**Target Date:** \_\_\_\_\_

**Cost/Resources Needed:** \_\_\_\_\_

<b>What Needs to Be Done:</b>	<b>Who Will Do It:</b>	<b>By When (Date):</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Goal:** \_\_\_\_\_

**Target Date:** \_\_\_\_\_

**Cost/Resources Needed:** \_\_\_\_\_

<b>What Needs to Be Done:</b>	<b>Who Will Do It:</b>	<b>By When (Date):</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Goal:** \_\_\_\_\_

**Target Date:** \_\_\_\_\_

**Cost/Resources Needed:** \_\_\_\_\_

<b>What Needs to Be Done:</b>	<b>Who Will Do It:</b>	<b>By When (Date):</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

# Goal Worksheet

**Goal:** \_\_\_\_\_

**Target Date:** \_\_\_\_\_

**Cost/Resources Needed:** \_\_\_\_\_

<b>What Needs to Be Done:</b>	<b>Who Will Do It:</b>	<b>By When (Date):</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Goal:** \_\_\_\_\_

**Target Date:** \_\_\_\_\_

**Cost/Resources Needed:** \_\_\_\_\_

<b>What Needs to Be Done:</b>	<b>Who Will Do It:</b>	<b>By When (Date):</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Goal:** \_\_\_\_\_

**Target Date:** \_\_\_\_\_

**Cost/Resources Needed:** \_\_\_\_\_

<b>What Needs to Be Done:</b>	<b>Who Will Do It:</b>	<b>By When (Date):</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____