

My Financial Goals Worksheet

Savings, Debt Reduction & Spending Redirection

Many of our money-related goals involve either saving for future things, reducing our debt, or a combination of the two. Other goals may be more about redirecting away from frivolous or wasteful things into those that are more productive, meaningful and beneficial. Use this worksheet to itemize your goals in these three categories.

Goal: Monthly Saving

Planned Amount

What's your monthly goal?

\$ _____

Why is this goal important to you?

How are you going to meet your goal?

Goal: Monthly Debt Reduction

Planned Amount

What's your monthly goal?

\$ _____

Why is this goal important to you?

How are you going to meet your goal?

Goal: Monthly Spending Redirection

What are you spending money on right now that is excessive, wasteful or hurtful?

Why is it important for you to change this spending pattern?

Where do you plan to redirect spending and why? (Out of what, and into what?)

Planned Amount

How much is this?

\$ _____