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# GOAL PLANNING WORKSHEET

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**Instructions:** Write/type a goal next to “Goal #1” below and complete the boxes in the “Description” chart. Then use the “What’s My Progress?” boxes to chart progress toward your goal in the coming months. Note: The “Goal #2” box is optional.

If your goal is going to take longer than three months, consider using “Goal #1” as your long-term goal and “Goal #2” as a goal that can be achieved over the next three months. Short-term goals can help you build momentum.

It’s a great idea to structure your goals in a way that shows where you are now and where you want to be when.

**Examples:**

1. Go from \$500 in savings to \$2,000 in savings by July 1, 2020.
2. Reduce debt balance from \$10,000 to \$7,000 by December 31, 2020.

## GOAL #1 (LONG-TERM):

WHAT’S YOUR PROGRESS?

Where Am I Now? \_\_\_\_\_

Month #1: \_\_\_\_\_

Short-Term Steps: \_\_\_\_\_

Month #2: \_\_\_\_\_

Why This Goal? \_\_\_\_\_

Month #3: \_\_\_\_\_

Your Reward? \_\_\_\_\_

What If It’s Not Met? \_\_\_\_\_

## GOAL #2 (SHORT-TERM):

WHAT’S YOUR PROGRESS?

Where Am I Now? \_\_\_\_\_

Month #1: \_\_\_\_\_

Short-Term Steps: \_\_\_\_\_

Month #2: \_\_\_\_\_

Why This Goal? \_\_\_\_\_

Month #3: \_\_\_\_\_

Your Reward? \_\_\_\_\_

What If It’s Not Met? \_\_\_\_\_