



My S.M.A.R.T Financial Goals Planning Worksheet

S = Specific; M = Measurable; A = Attainable; R = Relevant; T = Timebound

Short-Term Financial Goal 1

Goal Created: _____

Deadline: _____

Why is this goal important to me? _____

What resources do I have? _____

What challenges might I face? _____

Action Plan: _____

Short-Term Financial Goal 3

Goal Created: _____

Deadline: _____

Why is this goal important to me? _____

What resources do I have? _____

What challenges might I face? _____

Action Plan: _____

Short-Term Financial Goal 2

Goal Created: _____

Deadline: _____

Why is this goal important to me? _____

What resources do I have? _____

What challenges might I face? _____

Action Plan: _____

Short-Term Financial Goal 4

Goal Created: _____

Deadline: _____

Why is this goal important to me? _____

What resources do I have? _____

What challenges might I face? _____

Action Plan: _____

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Long-Term Financial Goal 1

Goal Created: _____

Deadline: _____

Why is this goal important to me? _____

What resources do I have? _____

What challenges might I face? _____

Action Plan: _____

Long-Term Financial Goal 3

Goal Created: _____

Deadline: _____

Why is this goal important to me? _____

What resources do I have? _____

What challenges might I face? _____

Action Plan: _____

Long-Term Financial Goal 2

Goal Created: _____

Deadline: _____

Why is this goal important to me? _____

What resources do I have? _____

What challenges might I face? _____

Action Plan: _____

Long-Term Financial Goal 4

Goal Created: _____

Deadline: _____

Why is this goal important to me? _____

What resources do I have? _____

What challenges might I face? _____

Action Plan: _____

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