

# PERSONAL FINANCIAL GOALS WORKSHEET

1. My (our) personal financial goal is: (the most successful goals are S.M.A.R.T. – specific, measurable, attainable, relevant, and time-based) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. What I (we) hope to gain as a result of accomplishing this goal: (Why is this important to you? When sticking to your goals contract gets difficult, the answer to this question should be what helps you stay on track and stick to it, i.e., financial freedom, security, peace, etc.) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. I am going to work on achieving my goal with the following people/support system: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Small objectives to achieve this goal include: (the things you need to start doing and/or stop doing in order to achieve your goal)

Objective	Completion Date
A.	
B.	
C.	
D.	
E.	

5. What problems might you encounter while trying to achieve this goal and its objectives: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. How can these problems be overcome? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. Projected date of completion for personal financial goal: \_\_\_\_\_
8. When an objective or goal is reached, I will reward myself by the following: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I do hereby commit to strive daily toward achieving the goal and objectives stated above.

Signatures (all participants)

Date

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_