

Activity: Your Financial Goals

Financial Goals

1. What are your cash flow goals? How much money would you like to clear after all your bills are paid?

Ex: \$1,500; enough to eat out twice a week; enough to travel four times a year

5 years from now

10 years from now

25 years from now



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2. What are your net worth goals? How much money would you like to have after all the debts you have are paid?

Ex: \$5,000; \$25,000; \$300,000; enough to buy a log cabin in the woods

5 years from now

10 years from now

25 years from now

3. If your plans work out, how would you feel?

Ex: excited; safe and secure; proud

4. Are there areas of your financial life that you can address that will help you attain your goals? What are the first steps? Don't write something vague like "make more money." What is a time-driven, specific, actionable first step you can take today?

Ex: implement a debt payoff plan; take on a second job; meet with a financial advisor

