

# Financial Goal-Setting Worksheet

Use this worksheet to identify your savings priorities and plan your financial future.



## Short-Term Goals (Within 1 Year)

**Examples:** Wedding, [emergency fund](#), paying off small debt, new furniture, holiday expenses

### Tips to reach your goals:

- ✓ Set up automatic transfers
- ✓ Create a monthly [spending and savings plan](#)
- ✓ Cut back on expenses
- ✓ Use bonuses/[tax refund](#)

	Target Amount	Target Date
<b>Goal 1:</b>		
Savings Plan:		
<b>Goal 2:</b>		
Savings Plan:		
<b>Goal 3:</b>		
Savings Plan:		



## Mid-Term Goals (1-5 Years)

**Examples:** Buying a home, having a child, paying down student loans, career development, new car

### Tips to reach your goals:

- ✓ Open a dedicated [savings account](#)
- ✓ Review subscriptions and service plans
- ✓ [Reduce debt](#) to free up room in your budget

	Target Amount	Target Date
<b>Goal 1:</b>		
Savings Plan:		
<b>Goal 2:</b>		
Savings Plan:		
<b>Goal 3:</b>		
Savings Plan:		

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## Long-Term Goals (5+ Years)

**Examples:** Retirement, saving for children's education, owning a business, dream travel, home renovations

### Tips to reach your goals:

- ✓ Celebrate progress
- ✓ Get support from a trusted financial advisor
- ✓ Set quarterly progress check-ins

	Target Amount	Target Date
<b>Goal 1:</b>		
Savings Plan:		
<b>Goal 2:</b>		
Savings Plan:		
<b>Goal 3:</b>		
Savings Plan:		

## An educated decision is a good decision.

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