



**FINANCIAL GOALS WORKSHEET**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

**WINDFALL:** You've won the lottery. What would you do with the money?

Name	Dreams	Total Cost

**FINANCIAL GOALS:** You've identified some dreams. Now choose your goals.

	Total Cost	Target Date to Complete	Number Pay Days to Save	Amount to save each Pay Day
<b>Now</b> ( <i>within a few months</i> ) 1. 2. 3.				
<b>Short Term</b> ( <i>6 months to 1 or 2 years</i> ) 1. 2. 3.				
<b>Long term</b> ( <i>longer than 1 or 2 years</i> ) 1. 2. 3.				