



## Financial Wellness Goal-Planning Worksheet

| Long-Term Goals                                   |                    |
|---|--------------------|
| Goal  | Time Frame         |
| 1. <b>EXAMPLE: I want to save for retirement.</b> | <b>10-25 years</b> |
| 2.  |                    |
| 3.  |                    |

| Medium-Term Goals  |                  |
|--|------------------|
| Goal   | Time Frame       |
| 1. <b>EXAMPLE: I want to save enough for a down payment on a home.</b> | <b>4-7 years</b> |
| 2.   |                  |
| 3.   |                  |
| 4.   |                  |
| 5.   |                  |

| Short-Term Goals                                      |                  |
|---|------------------|
| Goal  | Time Frame       |
| 1. <b>EXAMPLE: I want to pay off my credit cards.</b> | <b>1-3 years</b> |
| 2.  |                  |
| 3.  |                  |
| 4.  |                  |
| 5.  |                  |