Example Worksheet

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| **Financial Goals**  **Today’s Date: June 1, 2010** | | | |
| **Short Term Goals**  **(Less than 1 year)** | **Cost** | **Savings Per Pay Check** | **Deadline/Time Frame** |
| Example: Save $2500 in an emergency fund | $2500 | $156 per check; $312/month (paid twice per month) | February 1, 2011  (8 months) |
| **Midterm Goals (1-5 years)** | **Cost** | **Savings Per Pay Check** | **Deadline/Time Frame** |
| Example: House down payment - $9000 | $9000 | $200 per month | June 1, 2014 (4 years) |
| **Long Term Goals**  **(5 years and beyond)** | **Cost** | **Savings Per Pay Check** | **Deadline/Time Frame** |
| Example: Retirement | $300,000 | $250 per month | 30 years |

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| **Financial Goals**  **Today’s Date: \_\_\_\_\_\_\_\_\_\_\_** | | | |
| **Short Term Goals**  **(Less than 1 year)** | **Cost** | **Savings Per Pay Check** | **Deadline/Time Frame** |
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| **Midterm Goals**  **(1-5 years)** | **Cost** | **Savings Per Pay Check** | **Deadline/Time Frame** |
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| **Long Term Goals**  **(5 years and beyond)** | **Cost** | **Savings Per Pay Check** | **Deadline/Time Frame** |
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