

Example Worksheet

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