

**FINANCIAL
GOAL
SETTING
WORKBOOK**

**PLAN AHEAD
LIVE NOW**

DELIBERATELYHERE.COM

FINANCIAL GOAL SETTING WORKBOOK

NAME : _____

DATE : _____

CURRENT SAVINGS AMOUNT :

\$

I PLAN TO HAVE

\$

SAVED UP

IN

DAYS

MONTHS

YEARS

I AM SAVING THIS MONEY BECAUSE :

**THE BIGGEST STRUGGLE I HAVE FACED SO FAR
IN MY MONEY-SAVING JOURNEY IS :**

HOW I OVERCAME IT :

BUILDING AN EMERGENCY FUND

I WILL SET \$ ASIDE EACH MONTH

UNTIL I HAVE \$ IN MY EMERGENCY FUND



EMERGENCY FUND TRACKING SHEET

DATE	AMOUNT IN	NOTES	BALANCE
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$

WHERE I WANT TO BE FINANCIALLY IN 1 YEAR



WHERE I WANT TO BE FINANCIALLY IN 5 YEARS



WHERE I WANT TO BE FINANCIALLY IN 10 YEARS



THIS WOULD HAVE TO HAPPEN FOR ME TO FEEL COMPLETELY FINANCIALLY STABLE



ACTION STEPS I AM GOING TO TAKE TO GET WHERE I WANT TO BE FINANCIALLY

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

