

My Personal Financial Goals

A goal is a destination, something you want or need, which you acquire by taking certain steps. We all have goals which flow out of our life values. These are powerful motivators in our lives and shape our daily living.

What are your main goals for your finances at this time?

- ◆ Get out of debt
- ◆ Save for children's education
- ◆ Save for retirement
- ◆ Make a major purchase (home, car, appliance, etc.)
- ◆ Take a major vacation
- ◆ Save for emergencies
- ◆ Increase my wealth
- ◆ Give more to my church
- ◆ Give more to others
- ◆ Leave a greater legacy
- ◆ Other: _____

With your partner, identify 3 – 5 long term goals (one year or longer) that require money to accomplish.

1. _____

2. _____

3. _____

4. _____

5. _____
