

GOALS FOR THIS YEAR

Priority

Financial Goals

1	
2	
3	
4	
5	

EDUCATIONAL GOALS:

I would like to fund the following education.

Person	School	Annual Cost	Total Cost
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other educational goals: _____

LIFESTYLE GOALS

I would like to make the following major purchases (home, automobile, travel, etc.):

Item	Amount
_____	_____
_____	_____
_____	_____
_____	_____

I would like to achieve the following annual income: _____

Financial Goals

Date: _____

GIVING GOALS:

I would like to give _____ percent of my income.

Other giving goals: _____

DEBT REPAYMENT GOALS:

I would like to pay off the following debts first:

Creditor	Amount
_____	_____
_____	_____
_____	_____
_____	_____