

# Financial Goals Planner

## 1.Reflect

**Before you set your goals, use the prompts below to reflect on your financial journey, values, and dreams.**

**What is my current relationship with money?  
What relationship would I like to have with money?**

**What does financial freedom look like to me?**

**How do I feel about my current spending habits? Is this aligned with what I value?**

**How do I feel about my current saving habits? Is this helping me work toward my goals?**

**What major financial milestones do I want to achieve over the next 10 years?**

**How will achieving these milestones positively impact other areas of my life?  
(i.e. career, relationships, etc.)**

## 2. Set financial goals

Align your financial goals with your values, aspirations,  
and the life you want to create.

### Short-term goals (1 month – 1 year)

Goal	Estimated cost	Achievement date	Weekly savings needed

Medium-term goals (1 – 5 years)

Goal	Estimated cost	Achievement date	Weekly savings needed

## Long-term goals (5 – 10+ years)

Goal	Estimated cost	Achievement date	Weekly savings needed