

Goal Planning Worksheet

PREPARED FOR:

DATE: / /

You'll need:

- Net Worth Worksheet
- Cash-Flow Worksheet

GOAL: SHORT-TERM (5 years or fewer)

Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected cost (\$) <input type="text"/>

Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected cost (\$) <input type="text"/>

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Goal _____		
Date _____	Duration _____	Expected cost (\$) <input type="text"/>

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Goal _____		
Date _____	Duration _____	Expected cost (\$) <input type="text"/>

Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected cost (\$) <input type="text"/>

Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected cost (\$) <input type="text"/>

TOTAL: Short-Term Goals		<input type="text"/>
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Goal Planning Worksheet

PREPARED FOR:

DATE: / /

GOAL: INTERMEDIATE-TERM (5 to 15 years)

Goal Priority:

Goal _____

Date _____

Duration _____

Expected cost (\$) _____

Goal Priority:

Goal _____

Date _____

Duration _____

Expected cost (\$) _____

Goal Priority:

Goal _____

Date _____

Duration _____

Expected cost (\$) _____

Goal Priority:

Goal _____

Date _____

Duration _____

Expected cost (\$) _____

Goal Priority:

Goal _____

Date _____

Duration _____

Expected cost (\$) _____

Goal Priority:

Goal _____

Date _____

Duration _____

Expected cost (\$) _____

Goal Priority:

Goal _____

Date _____

Duration _____

Expected cost (\$) _____

Goal Priority:

Goal _____

Date _____

Duration _____

Expected cost (\$) _____

TOTAL: Intermediate-Term Goals

Goal Planning Worksheet

PREPARED FOR:

DATE: / /

GOAL: LONG-TERM (15 years or more)

Goal Priority:

Goal

Date

Duration

Expected cost (\$)

Goal Priority:

Goal

Date

Duration

Expected cost (\$)

Goal Priority:

Goal

Date

Duration

Expected cost (\$)

Goal Priority:

Goal

Date

Duration

Expected cost (\$)

Goal Priority:

Goal

Date

Duration

Expected cost (\$)

Goal Priority:

Goal

Date

Duration

Expected cost (\$)

Goal Priority:

Goal

Date

Duration

Expected cost (\$)

Goal Priority:

Goal

Date

Duration

Expected cost (\$)

TOTAL: Long-Term Goals