

**Personal Goals List**  
**Short Term Goals**  
 (Reachable within 6 to 12 months)

Goal	Time Needed to Reach Goal (in Months)	\$ Amount Needed	How Will I Get There?
<b>Pay Debt</b>			
- Automobile			
- Credit Cards			
- Outstanding Bills			
- Other debt			
Buy or lease a car			
Create Emergency Fund			
Home Repairs/ Improvements			
Charitable Contributions			
Clothes			
Gifts			
Entertainment			
Health			
Vacation			
<b>Insurance</b>			
- Auto			
- Homeowners/Renters			
- Health			

- Life			
- Long term care			
- Disability			
<b>Other</b>			

**Personal Goals List**  
**Medium Term Goals**  
 (Reachable within 1 to 2 years)

<b>Goal</b>	<b>Time Needed to Reach Goal (in years)</b>	<b>\$ Amount Needed</b>	<b>How Will I Get There?</b>
Buy a home/new home			
Investment Plan			
Education Fund			
Start New Business			
<b>Other:</b>			
Vacations			
Gifts			
Health			



Retirement Plan			
Vacations/ Vacation home			
Start New Business			
Other			

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