

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?
Pay Debt			
- 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			
Insurance			
- Auto			
- Homeowners/Renters			
- Health			

- Life			
- Long term care			
- Disability			
Other			

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

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

Clothes Auto Other			

Personal Goals List
Long Term Goals
 (Reachable within 3 to 5 years)
 Include very long term goals here (over 5 years) and review periodically

Goal	Time Needed to Reach Goal (in years)	\$ Amount Needed	How Will I Get There?
Pay off Mortgage			
Investment Plan			

Retirement Plan			
Vacations/ Vacation home			
Start New Business			
Other			

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