



SET YOUR FINANCIAL GOALS

Healthy financial habits start by setting sound financial goals. Develop a realistic path to achieving your goals by filling in the chart below.

General Information			
Monthly Household Net Income:		Number of Dependents:	
Monthly Necessary Expenses:		Your Age:	
Amount Remaining to Save for Goals:		Expected Graduation Date:	
Identify goals, cost, timeline, savings method, and anticipated rate of return.			
Set your goals	Goal #1:	Goal #2:	Goal #3:
Total cost of each goal			
Current funds available			
Time needed to achieve each goal			
Monthly contribution to achieve goal			
Funding source for monthly contribution			
Method for saving/investing for goal			
Expected interest rate/rate of return			

There could be risks that might keep you from reaching your goals.
In many cases, insurance can help protect against these risks.

Risks: Identify risks below that could keep you from reaching your goals and then check the boxes for any insurance you have that can protect you from each risk.	Types of Insurance with Monthly Cost					
	Life \$	Health \$	Disability \$	Auto \$	Home/Renters \$	\$

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