

SMART GIRL LIVING

Financial Goals Worksheet

Free Goal-Setting Planner — SMART Framework

WRITE IT DOWN. MAKE IT HAPPEN.

YOUR NAME

DATE STARTED

REVIEW DATE (MONTHLY)

MY FINANCIAL WHY

"What would my life look like if money wasn't a source of stress?"

THE SMART GOAL CHECKLIST — APPLY TO EVERY GOAL

S
SPECIFIC

M
MEASURABLE

A
ACHIEVABLE

R
RELEVANT

T
TIME-BOUND

MY FINANCIAL GOALS

SHORT-TERM GOAL 1		Under 1 Year
GOAL	_____	
TOTAL (\$)	_____	
DEADLINE	_____	
WHY IT MATTERS	_____	
Months Remaining	Monthly Contribution (\$)	
_____	_____	

SHORT-TERM GOAL 2		Under 1 Year
GOAL	_____	
TOTAL (\$)	_____	
DEADLINE	_____	
WHY IT MATTERS	_____	
Months Remaining	Monthly Contribution (\$)	
_____	_____	

MEDIUM-TERM GOAL		1-5 Years
GOAL	_____	
TOTAL (\$)	_____	
DEADLINE	_____	
WHY IT MATTERS	_____	
Months Remaining	Monthly Contribution (\$)	
_____	_____	

LONG-TERM GOAL		5+ Years
GOAL	_____	
TOTAL (\$)	_____	
DEADLINE	_____	
WHY IT MATTERS	_____	
Months Remaining	Monthly Contribution (\$)	
_____	_____	

12-MONTH PROGRESS TRACKER — CHECK EACH MONTH YOU HIT YOUR CONTRIBUTION TARGET

JAN Contributed _____ <input type="checkbox"/>	FEB Contributed _____ <input type="checkbox"/>	MAR Contributed _____ <input type="checkbox"/>	APR Contributed _____ <input type="checkbox"/>	MAY Contributed _____ <input type="checkbox"/>	JUN Contributed _____ <input type="checkbox"/>
JUL Contributed _____ <input type="checkbox"/>	AUG Contributed _____ <input type="checkbox"/>	SEP Contributed _____ <input type="checkbox"/>	OCT Contributed _____ <input type="checkbox"/>	NOV Contributed _____ <input type="checkbox"/>	DEC Contributed _____ <input type="checkbox"/>

YEAR-END SUMMARY

GOAL 1 TOTAL SAVED _____	GOAL 2 TOTAL SAVED _____	MEDIUM-TERM SAVED _____	LONG-TERM SAVED _____
-----------------------------	-----------------------------	----------------------------	--------------------------

ANNUAL REFLECTION

What goal am I most proud of? _____ _____	What will I do differently next year? _____ _____
My biggest financial lesson this year _____ _____	My #1 financial goal for next year _____ _____