

DEFINE YOUR GOALS



When you think about your future, what does it look like? Feel like? Can you almost visualize yourself achieving the goal? Building a vision for your future takes planning and preparation. This Financial Goal-Setting Worksheet is the first step on your journey to achieving your goals.



Short Term (under 3 years)

Define Your Goal	Amount Needed	\$
	Date Needed	
	Amount Saved Thus Far	\$
	Monthly Amount Needed to Save	\$
Define Your Goal	Amount Needed	\$
	Date Needed	
	Amount Saved Thus Far	\$
	Monthly Amount Needed to Save	\$
Define Your Goal	Amount Needed	\$
	Date Needed	
	Amount Saved Thus Far	\$
	Monthly Amount Needed to Save	\$



Set S.M.A.R.T. Goals

Specific • Measurable • Achievable • Relevant • Time-bound



Medium Term (3-10 years)

Define Your Goal	Amount Needed	\$
	Date Needed	
	Amount Saved Thus Far	\$
	Monthly Amount Needed to Save	\$
Define Your Goal	Amount Needed	\$
	Date Needed	
	Amount Saved Thus Far	\$
	Monthly Amount Needed to Save	\$



Long Term (10 or more years)

Define Your Goal	Amount Needed	\$
	Date Needed	
	Amount Saved Thus Far	\$
	Monthly Amount Needed to Save	\$
Define Your Goal	Amount Needed	\$
	Date Needed	
	Amount Saved Thus Far	\$
	Monthly Amount Needed to Save	\$

FOR MORE INFORMATION: www.blackrock.com

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