

Your Savings Goals Worksheet

My Short-Term Goals

Save for a vacation, down payment on a car, wedding, child birth or adoption? Build an emergency fund or capital to start a business? Pay down credit card debt?

Short-Term Savings Goals (within the next 5 years)	Estimated Cost	Months Out	Monthly Amount to Save (Estimated Cost/Months Out)
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
TOTAL to Save:			\$

My Long-Term Goals

Save for retirement or college education for your kids or grandkids? Set aside money for a down payment on a home or to start a new business?

Long-Term Investment Goals (5+ years in the future)	Estimated Cost	Months Out	Monthly Amount to Save (Estimated Cost/Months Out)
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
TOTAL to Save:			\$

Short-Term and Long-Term GRAND TOTAL to Save: \$



Make sure you transfer your savings goals over to your budget worksheet, on page 13.