

Household Financial Goal Worksheet

Date:

| SHORT-TERM GOALS (WITHIN 6 MONTHS) | ESTIMATED COST | TARGET DATE | AMOUNT TO SAVE WEEKLY |
|---------------------------------------|-------------------|----------------|--------------------------|
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| TOTAL to Save: R | | | |

| MEDIUM-TERM GOALS (WITHIN 2 - 5 YEARS) | ESTIMATED COST | TARGET DATE | AMOUNT TO SAVE WEEKLY |
|---|-------------------|----------------|--------------------------|
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| TOTAL to Save: R | | | |

| LONG-TERM GOALS (MORE THAN 5 YEARS) | ESTIMATED COST | TARGET DATE | AMOUNT TO SAVE WEEKLY |
|--|-------------------|----------------|--------------------------|
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| | R | | R |
| TOTAL to Save: R | | | |