

SMART GOALS WORKSHEET



Specific
Measurable
Achievable
Realistic
Time-bound

Improving your financial life requires planning, and that starts with setting goals that are Specific, Measurable, Achievable, Realistic and Time-bound (SMART).

Share your goals with a “financial buddy” and set specific dates to check-in on progress. Don’t forget to celebrate your successes!

Short-Term Goals (1-3 years)

Example: *I want to save \$200 in an emergency fund every month for the next 12 months. I will report my progress on the last Monday of the month to my financial buddy.*

I want to...	
This amount...	
This often...	
For this long...	
I commit to the following check-in dates with my financial buddy:	



Medium-Term Goals (3-5 years)

Example: *I want to save \$10,000 over the next three years for a house down payment. I will check in with my financial buddy every three months.*

I want to...	
This amount...	
This often...	
For this long...	
I commit to the following check-in dates with my financial buddy:	



Long-Term Goals (5-10 years)

Example: *I want to invest at least \$5,000 per year in my retirement funds for the next five years. I will check in with my financial buddy every six months.*

I want to...	
I commit to the following check-in dates with my financial buddy:	