

Specific Financial Objectives Worksheet

Use the following worksheet to designate your most important financial objectives. Use 1 to indicate the most important and 2 for second in importance and so on. Put your priority numbers in the appropriate time frame column. Use this worksheet to help you set goals within specific time frames. The objectives are just examples, add your own specific objectives and think about how your saving and investment plan can be modified to help you achieve your objectives within the stated time frames.

Objectives	Short-term	Medium-term	Long-term
	(1 year)	(5 years)	(5 - 10 years)
Education funds	_____	_____	_____
Reduce debt	_____	_____	_____
Buy a house	_____	_____	_____
Home improvements	_____	_____	_____
Buy a car	_____	_____	_____
Other large purchases	_____	_____	_____
Dream vacation	_____	_____	_____
Minimize taxes	_____	_____	_____
Change jobs	_____	_____	_____
Buy vacation home	_____	_____	_____
Financial independence	_____	_____	_____
Retirement income	_____	_____	_____
Charitable giving	_____	_____	_____
Early retirement	_____	_____	_____
Protect survivors	_____	_____	_____
Start a business	_____	_____	_____
Other:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Material provided by Michael P. Griffin.