

SMART Goals Worksheet



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:		





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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:	





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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.

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

