

Money Saving

GOALS



Worksheets

Print and use these Money Saving Goals worksheets as many times as you'd like for your personal use.

SMART Goals

SETTING A SMART GOAL IS THE FIRST STEP IN CREATING YOUR MONEY SAVING PLAN

S

SPECIFIC

THE GOAL SHOULD BE CLEARLY DEFINED.

WHAT WILL BE ACCOMPLISHED?
WHAT RESOURCES OR LIMITS ARE INVOLVED?
WHY IS IT IMPORTANT?
WHO WILL DO THE WORK?
WHERE WILL IT BE ACCOMPLISHED?

M

MEASURABLE

THE GOAL SHOULD BE MEASURABLE.

HOW WILL YOU MEASURE THE OUTCOME AND PROGRESS?
MEASURABLE GOALS SHOULD ASK QUESTIONS SUCH AS
HOW MANY? HOW MUCH? HOW LONG?

A

ACHIEVABLE

THE GOAL SHOULD BE ACHIEVABLE

THE GOAL SHOULD REALISTICALLY BE ABLE TO BE ACHIEVED.
THE RESOURCES NEEDED SHOULD BE WITHIN YOUR CONTROL OR
AVAILABLE TO YOU.
DO YOU HAVE THE TIME NEEDED? DO YOU HAVE THE FUNDS
NEEDED? DO YOU HAVE THE SKILLS AND RESOURCES NEEDED?

R

RELEVANT

THE GOAL SHOULD BE RELEVANT

THE GOAL SHOULD BE MEANINGFUL AND RELATE TO YOUR OTHER
GOALS.
HOW DOES THIS GOAL SUPPORT YOUR MISSION?
IS THE TIME RIGHT FOR THIS GOAL?
DOES THIS GOAL MATCH MY PURPOSE AND OTHER GOALS?

T

TIME BOUND

THE GOAL SHOULD BE TIME BOUND

THE GOAL SHOULD HAVE A DUE DATE.
WHY DID YOU CHOOSE THAT DATE?
WHEN WILL THIS GOAL BE ACCOMPLISHED?
WHAT CAN I DO TOMORROW TO ACCOMPLISH THE GOAL? NEXT
WEEK? NEXT MONTH?

Money Saving GOALS

SPECIFIC

ACHIEVABLE

TIME BOUND

MEASURABLE

RELEVANT

MY GOAL

MAKE IT A PLAN OR SMART GOAL

ACTION Steps

IDENTIFY THE NEXT STEP TO WORK TOWARDS YOUR GOAL, THEN THE NEXT STEP AND THEN THE NEXT AS FAR AS YOU CAN DETERMINE.
