



MONEY GOALS WORKSHEET



Hello beautiful mama, I created this worksheet just for you! I want to help you on your financial journey this year by making it super easy. All you have to do is follow these three steps:

1. **15 minutes** Write the answers below and if you have a spouse/partner/someone you share your financial goals with, have them fill this out as well.
2. **15 minutes:** Discuss your answers together or with yourself
3. **20 minutes:** Set up automations!
Log into your banking account and set up automatic monthly transfers to your debts, savings, investing, and retirement accounts as you lay out below. If you work a W2, schedule a meeting to speak with your HR department to automate your savings into your work retirement accounts.

Bonus Step: Get Excited! You are on your way toward financial independence!

Please be honest with yourself when completing this worksheet and really think about how much money you are willing to commit to each item. You will notice that most of the goals below do not focus on results but rather the process to reach your goals. Once you have the process down, you can set your automations and forget about them. It will only be a matter of time before you achieve your goals. Now, have fun and enjoy your journey!



By the end of this year or within the next 12 months I plan to achieve the following: *(put N/A if something is not applicable)*

My Monthly Goals

My monthly pretax income will be \$_____

My monthly expenses will average around \$_____

My monthly savings rate will be _____%

Debts

Every month, I will automate the following \$ amount towards my debts:

Principle	Interest	
\$_____	\$_____	Credit card debts
\$_____	\$_____	Student loans
\$_____	\$_____	Car loans
\$_____	\$_____	Other debt 1: _____
\$_____	\$_____	Other debt 2: _____
\$_____	\$_____	Other debt 3: _____
\$_____	\$_____	All other debts

By the end of 12 months I will only owe \$_____ towards my debt



Assets

Every month, I will automate the following \$ amount towards my savings and investments:

\$ _____ my retirement account(s) (401k/403(b), Traditional IRA, Roth IRA, etc.)

\$ _____ emergency fund

\$ _____ my traditional brokerage account(s)

\$ _____ a home or investment property(ies)

\$ _____ reserves for investment property(ies)

\$ _____ each child's college fund

\$ _____ life insurance

\$ _____ a family trip(s)

\$ _____ for our goal of _____

\$ _____ for our goal of _____

My net worth goal by the end of the year is \$ _____

If you are married or have a partner have them complete the their monthly goals below

Debts

Every month, I will automate the following \$ amount towards my debts:



Principle	Interest	
\$ _____	\$ _____	Credit card debts
\$ _____	\$ _____	Student loans
\$ _____	\$ _____	Car loans
\$ _____	\$ _____	Other debt 1: _____
\$ _____	\$ _____	Other debt 2: _____
\$ _____	\$ _____	Other debt 3: _____
\$ _____	\$ _____	All other debts

By the end of 12 months I will only owe \$ _____ towards my debt



Assets

Every month, I will automate the following \$ amount towards my savings and investments:

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\$ _____ reserves for investment property(ies)

\$ _____ each child's college fund

\$ _____ life insurance

\$ _____ a family trip(s)

\$ _____ for our goal of _____

\$ _____ for our goal of _____

My net worth goal by the end of the year is \$ _____

STOP: Before you do anything else, set up your automations, otherwise this worksheet is useless and won't help you achieve your goals.