

PAGE I

EVERY MISSION NEEDS A GOAL

If you're like most people, you probably have several financial goals in mind. Let's get them all out onto paper. No goal is too large or too small. If you want to buy your own tropical island, write it down!

Ask your significant other to join. After all, they might want to buy a mountain cabin instead of an island.

👉 Try to think about long-term goals and smaller, short-term goals. Experts say that while all financial goals are unique, the routes to achieving them are remarkably similar.

- getting organized
- changing your spending patterns
- saving money

My Financial Goals




PAGE 2

PRIORITIZE YOUR GOALS

What are your most pressing financial goals? Number your goals, starting with your most important.

If you have a family, you'll find it's important to take their wants and desires seriously. But don't forget to include your own goals.

 If you're prioritizing as a group, you might want to use a pencil with an eraser for this activity!



Most Important Financial Goals

GOAL 1: _____

GOAL 2: _____

GOAL 3: _____

GOAL 4: _____

GOAL 5: _____

GOAL 6: _____

GOAL 7: _____

GOAL 8: _____

GOAL 9: _____

PAGE 3

MAP OUT A PATH TO YOUR GOAL

It's time to bring your dreams into reality by dividing them into smaller missions.

Think about splitting up responsibility for some activities. For example, you could research mortgage brokers while your spouse explores the different types of real estate agents.

☞ Remember to address the three basic steps of financial control:

- getting organized
- changing your spending patterns
- saving money

☞ Allow yourself time to learn about specific financial tools like mortgages, retirement plans, college tuition plans, taxes, or whatever your goal requires.



	GOAL 1	GOAL 2	GOAL 3
FIRST STEP			
SECOND STEP			
THIRD STEP			
FOURTH STEP			
FIFTH STEP			
SIXTH STEP			



Once you've completed this activity, add these smaller missions to a calendar that you see and use often. Space out your milestones with a little extra time built in—daily emergencies can interrupt even the best-laid plans.



Reward yourself with a small treat for achieving the smaller missions, but don't backslide with a shopping spree. After all, an ice-cream sundae isn't a good reward when you're on a diet!

