

# GOAL SETTING WORKSHEET

MAKE YOUR FINANCIAL DREAMS A REALITY WITH THESE EASY GOAL-SETTING STEPS.

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## DEFINE YOUR SMART SAVINGS GOALS

- GOALS SHOULD BE SPECIFIC, MEASURABLE, ACHIEVABLE, AND HAVE A TIME FRAME ATTACHED (SMART).
- SET GOALS IN THREE CATEGORIES: SHORT-TERM (3-6 MOS.), MEDIUM-TERM (1-3 YEARS), AND LONG-TERM (3+ YEARS).

2



## BREAK IT DOWN

- START SMALL: IDENTIFY MANAGEABLE, SMALL STEPS TOWARD YOUR GOAL (E.G., SAVE \$10 WEEKLY).
- TRACK PROGRESS: USE A SAVINGS TRACKER OR APP TO VISUALIZE YOUR JOURNEY.

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## BUILD A SAVINGS PLAN

- CREATE A SPENDING & SAVINGS PLAN
- AUTOMATE YOUR SAVINGS
- FIND CREATIVE WAYS TO SAVE

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## STAY MOTIVATED

- VISUALIZE THE FINISH LINE
- CELEBRATE MILESTONES

Your Path to Success Starts Here! Visit [AmericaSaves.Org](https://AmericaSaves.Org) to take the pledge and find more resources to help you reach your financial goals. Start small, think BIG, and watch your savings grow!