

2025 Financial Goals Worksheet



Short-Term Goals (1-6 months):

Mid-Term Goals (6-12 months):

Long-Term Goals (Beyond 12 months):

Goal 1: _____

Target Amount: \$ _____

Deadline: _____

Action Steps:

Goal 2: _____

Target Amount: \$ _____

Deadline: _____

Action Steps:

Goal 3: _____

Target Amount: \$ _____

Deadline: _____

Action Steps:

Goal 4: _____

Target Amount: \$ _____

Deadline: _____

Action Steps:

Budget



Monthly Income: \$ _____

Fixed Expenses (e.g., rent, utilities): \$ _____

Variable Expenses (e.g., groceries, entertainment): \$ _____

Savings Goal: \$ _____

Debt Repayment Goal: \$ _____

Use this space to note milestones, challenges, and adjustments:

Month 1: _____

Month 3: _____

Month 6: _____

Month 9: _____

Month 12: _____

