Goal Planning Worksheet

PREPARED FOR: DATE: GOAL: SHORT-TERM (5 years or fewer) You'll need: Goal Priority: ■ Net Worth Worksheet ■ Cash-Flow Worksheet Goal Date Expected cost (\$) Goal Priority: Goal Date Duration Expected cost (\$) **Goal Priority:** Goal Date Duration Expected cost (\$) Goal Priority: Goal Date Duration Expected cost (\$) Goal Priority: Goal Date Duration Expected cost (\$) Goal Priority: Goal Date Duration Expected cost (\$) **Goal Priority:** Goal Expected cost (\$) Date Duration Goal Priority: Goal Date Duration Expected cost (\$)

TOTAL: Short-Term Goals

GOAL: INTERMEDIATE-TERM (5	to 15 years)		
Goal Priority:			
Goal			
Date	Duration	Expected cost (\$)	
Goal Priority:			
Goal			
Date	Duration	Expected cost (\$)	
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Date	Duration	Expected cost (\$)	
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Date	Duration	Expected cost (\$)	
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Date	Duration	Expected cost (\$)	
Goal Priority:			
Goal			
Date	Duration	Expected cost (\$)	
Goal Priority:			
Goal			
	Duration	Evacated and (#1	
Date	Duration	Expected cost (\$)	

GOAL: LONG-TERM (15 years or more) Goal Priority: Goal Date Duration Expected cost (\$) Goal Priority: Goal Duration Expected cost (\$) Goal Priority: Duration Expected cost (\$) Date Goal Priority: Goal Date Duration Expected cost (\$) Goal Priority: Goal Date Duration Expected cost (\$) Goal Priority: Goal Expected cost (\$) Date Duration Goal Priority: Goal Date Duration Expected cost (\$) Goal Priority: Goal Expected cost (\$) Date Duration **TOTAL: Long-Term Goals**