Goal Planning Worksheet

PREPARED FOR: _____   DATE: _____ / _____ / _____

GOAL: SHORT-TERM (5 years or fewer)

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 _____

Date _____ Duration _____ Expected Cost ($) _____ [_____]

Goal Priority:

Goal _____

Date _____ Duration _____ Expected Cost ($) _____ [_____]

Goal Priority:

Goal _____

Date _____ Duration _____ Expected Cost ($) _____ [_____]

TOTAL: Short-Term Goals _____ [_____]

Goal Planning Worksheet

PREPARED FOR: DATE: /   /

GOAL: INTERMEDIATE-TERM (5–15 years)

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

Date	Duration	Expected Cost ($)	

Goal Priority:

Goal

Date	Duration	Expected Cost ($)	

Goal Priority:

Goal

Date	Duration	Expected Cost ($)	

TOTAL: Intermediate-Term Goals

Goal Planning Worksheet

PREPARED FOR: DATE: /   /

GOAL: LONG-TERM (15 years or more)

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

Date	Duration	Expected Cost ($)	

Goal Priority:

Goal

Date	Duration	Expected Cost ($)	

Goal Priority:

Goal

Date	Duration	Expected Cost ($)	

TOTAL: Long-Term Goals