



Financial Goals

Mission Statement (Vision)

Intermediate Goals	Total Cost	Saved Monthly	Date Will Achieve
1.			
2.			
3.			
4.			
Personal Goals			
1.			
2.			
3.			
Short- Term Goals			
1.			
2.			
Long- Term Goals			
Auto			
College			
Marriage			
House			
Other			
Other			
Retirement			
1.			
2.			
Where I Am Now:			



Action Steps for Goals

Goal 1: _____

Goal 2: _____

Goal 3: _____

Goal 4: _____

Financial Planning Checklist

Check List	Got It Mastered	Could Use Improvement	Oops!
I have a clear idea of God's purpose for my finances.			
My commitment to financially support the church is solid.			
I have written down my long and short-term goals.			
I set aside money to achieve specific goals.			
I have a built up three months' worth of emergency money.			
I know how my parents influenced my views on finances.			
I have a budget and track my monthly income and expenses.			
I have a filing system to keep track of my financial records.			
I have determined to get out of debt on a set period of time.			
I avoid impulse buying and plan all my purchases.			
I pay off the entire balance on my credit card when it's due.			
I am putting money toward a retirement plan.			
I save for major purchases to avoid high credit charges.			
I regularly monitor my financial plan and make changes.			
I often try to improve myself and my earning potential.			
Note:			

Prompt questions from Larry Burkett