

MY LIFE AND FINANCIAL GOALS WORKSHEET

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How would you define or describe your life purpose?

What are some goals that can help you achieve this life purpose?

What are some financial goals that can help support your life goals and purpose?

Short-term financial goals (next 12 months):

1.

2.

Mid-range financial goals (2–5 years):

1.

2.

Long-term financial goals (5 years to retirement):

1.

2.

BASIC BUDGET WORKSHEET

<i>Item</i>	<i>Actual %</i>	<i>Suggested %*</i>	<i>Plan for next 12 months</i>
Housing		25–35%	
Transportation		10–15%	
Charitable Gifts		10–12%	
Food		5–15%	
Saving		5–10%	
Utilities		5–10%	
Medical/Health		5–10%	
Debt		5–10%	
Clothing		2–7%	
Miscellaneous		12–23%	

* These percentages are adapted from Dave Ramsey's *The Total Money Makeover* (Thomas Nelson, 2007).