

Goal Planning Worksheet

PREPARED FOR:

DATE: / /

You'll Need:

- Net Worth Worksheet (Worksheet 1.1), if completed
- Personal Cash-Flow Statement (Worksheet 2.1), if completed

Calculators:

To estimate future costs for retirement, college, and other financial goals, go to: www.morningstar.com/goto/30MinuteSolutions

GOAL: **SHORT-TERM** (5 years or fewer)

Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected Cost (\$) <input type="text"/>
Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected Cost (\$) <input type="text"/>
Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected Cost (\$) <input type="text"/>
Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected Cost (\$) <input type="text"/>
Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected Cost (\$) <input type="text"/>
Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected Cost (\$) <input type="text"/>
Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected Cost (\$) <input type="text"/>
Goal Priority:		
Goal _____		
Date _____	Duration _____	Expected Cost (\$) <input type="text"/>
TOTAL: Short-Term Goals		
<input type="text"/>		

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