

My Life and Financial Goals Worksheet

How would you define or describe your life purpose?

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

What are some financial goals that can help to 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

Item	Actual %	Suggested %*	Plan for next 12 months
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).