

Money Journeys — Complete Goals

Name: _____ Plan your 1-month, 6-month, and 1-year goals

Instructions: Mark today on the timeline, then complete each goal box. Keep it somewhere you'll see it every day.

Now

1 mo

6 mo

1 yr

1-Month Goal (Short Term)

Goal: _____

Why it matters: _____

Total Cost: \$ _____ Saved: \$ _____ Left: \$ _____

Target Date: _____ Start Date: _____

6-Month Goal (Medium Term)

Goal: _____

Why it matters: _____

Total Cost: \$ _____ Saved: \$ _____ Left: \$ _____

Target Date: _____ Start Date: _____

1-Year Goal (Long Term)

Goal: _____

Reflection (later): What did I learn?

Why it matters: _____
What went well? _____

What I learned to improve next time: _____
Total Cost: \$ _____ Saved: \$ _____ Left: \$ _____

Next tiny step I'll take: _____
Target Date: _____ Start Date: _____

Tip: Big goals = small steps done often.

Goal Action Plans

1-Month Goal (Short Term)

Goal: _____

Progress Tracker:

W1	W2	W3	W4
----	----	----	----

Total Cost: \$_____ Already Saved: \$_____ Left: \$_____

Weeks/Months to go: _____ Weekly/Monthly Target: \$_____

Where the money comes from (jobs/allowance/other):

- 1) _____
- 2) _____
- 3) _____

Possible Obstacles:

- _____
- _____

Who can help me?

- _____
- _____

6-Month Goal (Medium Term)

Goal: _____

Progress Tracker:

M1	M2	M3	M4	M5	M6
----	----	----	----	----	----

Total Cost: \$_____ Already Saved: \$_____ Left: \$_____

Weeks/Months to go: _____ Weekly/Monthly Target: \$_____

Where the money comes from (jobs/allowance/other):

- 1) _____
- 2) _____
- 3) _____

Possible Obstacles:

- _____
- _____

Who can help me?

- _____
- _____

1-Year Goal (Long Term)

Goal: _____

Progress Tracker:

M1	M2	M3	M4	M5	M6
----	----	----	----	----	----

Total Cost: \$_____ Already Saved: \$_____ Left: \$_____

Weeks/Months to go: _____ Weekly/Monthly Target: \$_____

M7	M8	M9	M10	M11	M12
----	----	----	-----	-----	-----

Where the money comes from (jobs/allowance/other):

- 1) _____

Possible Obstacles: