My Life and Financial Goals Worksheet

Basic Budget Worksheet

These worksheets are for your use only.

How would you define or describe your life purpose?	<u>ltem</u>	Actual %	Suggested %*	Plan for next 12 months
	Housing	%	á 25–35%	
What are three goals that can help you to achieve this life purpose?	Transportation	%	6 10-15%	
1	Charitable Gifts	%	6 10-1 2 %	
What are some financial goals that can help to support your life goals	Food	%	6 5-15%	
and purpose?	Saving	%	5 5-10%	
	Utilities	%	5-10%	
Short-term financial goals (next 12 months): 1	Medical/Health	%	5 5-10%	
2 Mid-range financial goals (2–5 years):	Debt	%	5 5-10%	
1	Clothing	%	ź 2 -7%	
2Long-term financial goals (5 years to retirement):	Miscellaneous	%	ó 12-23%	
1				

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

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