

My Life and Financial Goals Worksheet

These worksheets are for your use only.

How would you define or describe your life purpose? _____

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

1. _____

2. _____

3. _____

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

<u>Item</u>	<u>Actual %</u>	<u>Suggested %*</u>	<u>Plan for next 12 months</u>
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).

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