

# Quick Goal-Setting Checklist

A quick financial check-in to help you reflect on what matters most, and what direction you're heading in.



\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

→ **Step 1:** What are you working toward?

- ☐ Pay off debt
- ☐ Build savings
- ☐ Start investing
- ☐ Prepare for retirement
- ☐ Reduce financial stress
- ☐ Buy a home
- ☐ Create a spending plan
- ☐ Travel more
- ☐ Other: \_\_\_\_\_

→ **Step 2:** What's one small step you can take this month?

- ☐ Schedule a money check-in
- ☐ Review subscriptions
- ☐ Set a savings reminder
- ☐ Talk with a financial advisor
- ☐ Track my spending for one week
- ☐ Other: \_\_\_\_\_

→ **Step 3:** What feels *most* important right now?

Write down one or two things that matter most to you in this season of life:

\_\_\_\_\_  
\_\_\_\_\_

→ **Step 4:** Final Thoughts

**How do you want to feel about money** this time next year? **Check** one or write your own:

- ☐ Confident | ☐ Calm | ☐ In Control | ☐ Excited | ☐ Relieved | ☐ Focused | \_\_\_\_\_