

FINANCIAL GOAL SETTING

1. Circle the number that shows how comfortable you feel in each of the following areas with 0 being low and 10 being high.

	Low										High
Budgeting	0	1	2	3	4	5	6	7	8	9	10
Debt	0	1	2	3	4	5	6	7	8	9	10
Credit Record	0	1	2	3	4	5	6	7	8	9	10
Banking	0	1	2	3	4	5	6	7	8	9	10
Savings	0	1	2	3	4	5	6	7	8	9	10
Health Benefits/ Coverage	0	1	2	3	4	5	6	7	8	9	10
Housing	0	1	2	3	4	5	6	7	8	9	10
Insurance	0	1	2	3	4	5	6	7	8	9	10
Retirement	0	1	2	3	4	5	6	7	8	9	10

2. Which one area do you most want to improve?

- | | | |
|--|---|-------------------------------------|
| <input type="checkbox"/> Budgeting | <input type="checkbox"/> Banking | <input type="checkbox"/> Housing |
| <input type="checkbox"/> Debt | <input type="checkbox"/> Savings | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Credit Record | <input type="checkbox"/> Health Benefits/
Coverage | <input type="checkbox"/> Retirement |

3. What financial goal could you set for that area?

My goal is _____

4. What could you do to make progress towards that goal?

*In the next **week**, I will* _____

*In the next **month**, I will* _____
