

Monthly Financial Goals Worksheet

Month / Year

e.g., June 2024

Prepared By

Your Name

1. Financial Goals

Goal Description	Target Amount	Deadline
e.g., Save for vacation		e.g., June 23

2. Income Sources

Source	Expected Amount
e.g., Salary	

3. Planned Expenses

Category	Budgeted Amount
e.g., Housing	

4. Notes / Action Steps

E.g., Set up automatic transfer to savings accountâ€¦

