

Monthly Financial Goals Worksheet

Month / Year

e.g., June 2024

Prepared By

Your Name

1. Financial Goals

Goal Description	Target Amount	Deadline
<div>e.g., Save for vacation</div>	<div></div>	<div>e.g., June 23</div>
<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>

2. Income Sources

Source	Expected Amount
<div>e.g., Salary</div>	<div></div>
<div></div>	<div></div>
<div></div>	<div></div>

3. Planned Expenses

Category	Budgeted Amount
<div>e.g., Housing</div>	<div></div>
<div></div>	<div></div>
<div></div>	<div></div>
<div></div>	<div></div>

4. Notes / Action Steps

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

