

# 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.

	<u>Low</u>										<u>High</u>
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
Other: _____	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"/> Other: _____ |

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* \_\_\_\_\_  
 \_\_\_\_\_