

GOLDEN BELT BANK

FINANCIAL GOAL TEMPLATE

STEP 1: AWARENESS

Housing:

Mortgage/Rent, Utilities, Etc.

Food:

Groceries, Eating Out, Etc.

Personal:

Clothing, Subscriptions, Phone, Etc.

Other Essentials:

Insurance, Transportation, Child Care, Etc.

STEP 2: CREATE

Create a few small, manageable goals.

Goal #1

Goal #2

Goal #3

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STEP 3: IMPLEMENT

Put habits to help reach your goals.

STEP 4: EVALUATE

Evaluate your progress. Did you achieve your goals?

Goal	Achieved	Reflection /Results/ Comments
Goal #1		
Goal #2		
Goal #3		