



THE SAVVY FINANCE COACH

Goal Setting Worksheet

*Adapted from Fiscal Fitness Podcast: [Season 2, Episode 9](#)

My GOOD goal is: _____

My BETTER goal is: _____

My BEST goal is: _____

Target Date: _____

Action Steps (what I will do to accomplish my goal, include dates):

- _____
- _____
- _____
- _____
- _____

Obstacles that may arise:

How I plan to respond to obstacles:

- _____
- _____
- _____
- _____
- _____

- _____
- _____
- _____
- _____
- _____

How will I reward myself when I reach my goal? _____

What goal will I work on next after this goal is met?

Good Goal: This is a goal that you can see very clearly and is very obtainable. Achieving this goal won't be very difficult – something would have to go very wrong to not accomplish this goal.

Better Goal: This goal will take some extra effort and some extra attention to obtain, but you can clearly identify the path and the work necessary to achieve this goal.

Best Goal: You would be doing backflips if you achieved this goal. This goal currently seems unattainable, but you are going to set a goal that seems to defy possibility – just in case all the stars align, the Gods smile down upon you, and all your dreams come true.

SMART Goal

- **Specific:** exactly what you want
- **Measurable:** something you can tell is done or not
- **Actionable:** something *you* can do
- **Realistic/Relevant:** does it align with your big picture goals
- **Time-bound:** set a due date (schedule all due dates: for action steps, deadline, check-in notifications, final deadline)