**FINANCIAL GOAL SETTING FORM**

1. Circle the number that shows how comfortable you feel in each of the following areas with 0 being low and 10 being high.

Low High

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/ 0 1 2 3 4 5 6 7 8 9 10

Coverage

Housing 0 1 2 3 4 5 6 7 8 9 10

Insurance 0 1 2 3 4 5 6 7 8 9 10

Retirement 0 1 2 3 4 5 6 7 8 9 10

2. Which one area do you most want to improve?

Budgeting

Debt Credit Record

Banking

Savings

Health Benefits/ Coverage

Housing Insurance

Retirement

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