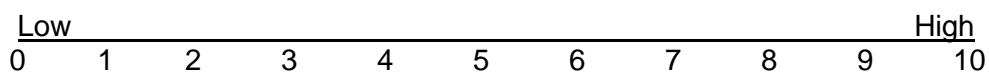


# MY FINANCIAL GOAL SETTING FORM

Name \_\_\_\_\_ Date \_\_\_\_\_

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



Budgeting

Debt

Credit Record

Banking

Savings

Health Benefits/Coverage

Housing

Insurance

Retirement

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 toward that goal?

*In the next **week**, I will*

*In the next **month**, I will*