**Financial Goals Worksheet**

1. When I think about my current financial situation, I feel like:  
   \_\_ I have more money than I need and want to learn how to manage it better  
   \_\_ I have just the right amount of money to live my best life  
   \_\_ I don’t have as much money as I want to live my best life, but I’m making it work  
   \_\_ I don’t have enough money to meet my basic needs  
   \_\_ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Keeping in mind your answer to Question 1, what are your short-term financial goal(s)?   
   *Examples: “Learn how to manage my money better”, “Learn how to use the money I earn to meet my basic needs”, “Buy a new coat”, “Pay off my credit card balance” and/or “Give money to the Food Bank”.*  
     
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3. Imagine that you had at least enough money to live your best life each month right now, what financial goal(s) would you set for the far-off future (like when you’re 40 years old). Examples might be “Get a dog”, “Purchase a home”, “Have a reliable car that is paid off”, “Support my family”, “Take a nice vacation every year”, or “Donate money to deserving organizations”.  
     
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