

Balanced Money Goal Project



For:

Date:

All-Around Goals

Consider what you want to achieve in the following areas and list all of your goals.

Skills, degrees, knowledge...What do you want to learn?



Education

Experiences, moments, environment, communication, what do you want for your family?



Family

What do you want to achieve with your work?



Career

How do you want to take care of your body?



Health/Fitness

Activities, hobbies, having fun... what do you want for your social life?



Social

What do you want to stay centered and develop inner peace and guidance?



Spiritual

What money goals do you have?



Financial

Now choose your top 5 goals from what you wrote above.

Priority	Goal	Reason of Importance
1		
2		
3		
4		
5		

Add dollar amounts to your goals

Goal

\$ Needed for Goal (Monthly or
Lump Sum)

Date to Achieve Goal

Goal	\$ Needed for Goal (Monthly or Lump Sum)	Date to Achieve Goal

Notes

Write down what changes you need to make to reach these goals. What do you need to start? What do you need to stop? What is the total \$ amount that you need to reach?