

COACHING PACKAGE

Financial Goal-Setting Activity

| Type of goal | Goal | Target date | Steps to reach my goal | I know I reached my goal if... | My reason to achieve this goal |
|--|------|-------------|------------------------|--------------------------------|--------------------------------|
| GOAL #1 SHORT TERM (3 months) | | | 1. | | |
| | | | 2. | | |
| | | | 3. | | |
| GOAL #2 SHORT TERM (6 months) | | | 1. | | |
| | | | 2. | | |
| | | | 3. | | |
| GOAL #3 LONG TERM (2 years or more) | | | 1. | | |
| | | | 2. | | |
| | | | 3. | | |