Financial Goals Worksheet

Establishing your financial goals for the future is the first step in achieving them. Redwood Credit Union is pleased to provide you with this simple worksheet to help you determine how much you need to save to reach your goals.

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	Goals	Target Date	Total Amount Needed	Current Savings	Remaining Amount
Short-Term Goals (under 1 year)					
Mid-Term Goals (1-5 years)					
Long-Term Goals (over 5 years)					

Savings Goals

Actionable Item to Achieve Goals:	I Will Complete By:

Credit Goals

Actionable Item to Achieve Goals:	I Will Complete By:

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