

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.

		Target Date	Total Needed	Current Savings	Additional Savings Needed	Months until Target Date	Savings Needed per Month
Short-term Goals (under 1 year)							
Mid-term Goals (1-5 years)							
Long-term Goals (over 5 years)							