

What are your goals?

My Educational Goals are:

1. _____
Goal Length Type: Short-term Mid-term Long-term

2. _____
Goal Length Type: Short-term Mid-term Long-term

3. _____
Goal Length Type: Short-term Mid-term Long-term

My Social Goals are:

1. _____
Goal Length Type: Short-term Mid-term Long-term

2. _____
Goal Length Type: Short-term Mid-term Long-term

3. _____
Goal Length Type: Short-term Mid-term Long-term

My Financial Goals are:

1. _____
Goal Length Type: Short-term Mid-term Long-term

2. _____
Goal Length Type: Short-term Mid-term Long-term

3. _____
Goal Length Type: Short-term Mid-term Long-term

Note: Short-term = 1-4 weeks, Mid-term = 2-12 months, Long-term = 1 year or longer

Prioritize Your Goals

Goal #1: _____

What I can be doing right now to work towards this goal:

The resources I need to achieve this goal are: When do I need to achieve this goal by: _____

Goal #2 : _____

What I can be doing right now to work towards this goal:

The resources I need to achieve this goal are: When do I need to achieve this goal by: _____

Goal #3: _____

What I can be doing right now to work towards this goal:

The resources I need to achieve this goal are: When do I need to achieve this goal by: _____

Where does your money come from?

Income	Budget	Actual	Difference
<i>Job #1</i>	\$	\$	\$
<i>Job #2</i>	\$	\$	\$
<i>Financial Aid</i>	\$	\$	\$
<i>Other</i>	\$	\$	\$
Total monthly income	\$	\$	\$

Where does your money go?

Expenses	Budget	Actual	Difference
<i>Fixed regular expenses</i>			
<i>Rent</i>	\$	\$	\$
<i>Car insurance</i>	\$	\$	\$
<i>Car Payment</i>	\$	\$	\$
<i>Job #1</i>	\$	\$	\$
<i>Fixed irregular expense</i>			
<i>Food</i>	\$	\$	\$
<i>Utilities</i>	\$	\$	\$
<i>Savings</i>	\$	\$	\$
<i>Transportation</i>	\$	\$	\$
<i>Bus Fare</i>	\$	\$	\$
<i>Gas and maintenance</i>	\$	\$	\$
<i>Cell Phone</i>	\$	\$	\$
<i>Repairs</i>	\$	\$	\$
<i>Other</i>	\$	\$	\$
<i>Medical Expenses</i>	\$	\$	\$
<i>Clothing</i>	\$	\$	\$
<i>Entertainment</i>	\$	\$	\$
<i>Household Items</i>	\$	\$	\$
<i>Personal Items</i>	\$	\$	\$
<i>Tuition</i>	\$	\$	\$
<i>School Expenses</i>	\$	\$	\$
Total Monthly Expenses	\$	\$	\$

Total Monthly income – Total monthly Expenses = Budget: \$_____ Actual: \$_____ Diff: _____

Goal #1: Required Budget: _____ Action to be take: _____

Goal # 2: Required Budget: _____ Action to be take: _____

Goal #3: Required Budget: _____ Action to be take: _____

Monthly discretionary: _____ Required monthly action: _____ Remaining budget: _____

Goals can be met: Yes No

Goals need to be revised: Yes No