

Financial Goal Worksheet

What You Want	What It Will Cost	When You Want It Measured In Years	Annual Payment Cost Divided by Years	Monthly Payment Annual Payment Divided by 12	Timeframe Short-Term: 0-5 (years) Medium-Term: 6-10 Long-Term: over 10	Acceptable Risk Level High, Medium, or Low	Mutual Fund Allocation Percentages			
							Stocks	Bonds	Money Market	International
[EXAMPLE] Lexus	\$45,000	5	\$9,000	\$750	Short-Term	Low	25	40	35	0
1)										
2)										
3)										
4)										
5)										
6)										
7)										
8)										
9)										
10)										
11)										
12)										
13)										
14)										
15)										

Copyright © 1996 Jason Kelly. All Rights Reserved.

From The Neatest Little Guide To Mutual Fund Investing